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ABSTRACT

In 1987, the College of the Mainland undertook a project to update curricula in real estate, business management, and office technology. The project entailed a survey of the labor market to clarify personnel needs in selected fields; the use of the DACUM (Developing a Curriculum) process, which involved expert workers in the creation of task descriptions for their occupations to be used to verify or reject course content; and a variety of activities to evaluate current program offerings and needs. Using a composite of all evaluations, the faculty confirmed the short- and long-term need for training in real estate sales and brokerage, business management, and office technology. The project report provides: (1) an overview of the activities and outcomes of the curriculum review and development project; (2) a description of the methods and findings of the labor market survey of 800 local firms; (3) DACUM process results for each program, including a description of the participants in the DACUM workshops, a DACUM chart showing job duties and related tasks, and detailed task analyses for each occupation; and (4) a plan for articulated programs with secondary and other post-secondary institutions in the Mainland Texas area. (AJL)

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ED300061

The Curriculum Improvement Project in Business Careers Programs

* Business Manager
* Office Administrator
* Real Estate Agent
* Real Estate Broker

Prepared by
College of the Mainland

Through a Grant from Coordinating Board
Texas College and University System
PVEP 88-1030-20
Project Director: Dorothy E. McNutt, Ed.D.
Project Coordinator: Maryann Pringle
June 30, 1988

JC 880 477

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ACKNOWLEDGEMENTS

Development of this project occurred during the 1987-88 school year culminating in June, 1988. Much time, talent, dedication, and expertise were invested in this project by the following members of the Project Advisory Committee: Dr. John Bethscheider, Alvin Community College; Dr. Robert Lyon, Texas A & M University; Dr. Robert Hodgin, University of Houston-Clear Lake; Dr. Robert Day, Coordinating Board, Texas College and University System; Dr. Cheryl Willis, Galveston College; Dr. Don Bass, College of the Mainland; Dr. William Tapp, College of the Mainland; Joyce White, College of the Mainland; and Kenneth Sheffield, College of the Mainland.

In addition, recognition and gratitude are expressed to Dawn Mullen, Caron Clement, Sally Briggs, Mona Miller, Laura Garcia, and Walt Kessler of College of the Mainland for their time, talents, and skills.

Maryann Pringle
Project Coordinator

F O R E W O R D

College of the Mainland, located on the mainland of Galveston County, encompasses five ISDs. Including service areas that reach north to Clear Lake City and west to Friendswood, the College serves over 3,500 credit students. The Division of Business enrolls approximately one-half of the technical and occupational majors. Curriculum revision is an accepted, on-going process in the Division; however, in the spring of 1987, the faculty recognized a need for a formalized, verifiable system for curriculum improvement. After consultations with Dr. Robert Day and Mr. Mike Warthal of the Coordinating Board, Texas College and University System, the Chairperson, Division of Business, wrote and submitted a project proposal for updating curricula in real estate, business management, and office technology.

On November 6, 1987, the award for the Project was approved by the Coordinating Board through a grant of the Carl D. Perkins Act. All obligations and objectives of the Project, which was first written for a 12-month activity period, were accomplished in seven months.

In the early 80's all business programs were evaluated and updated through the DACUM process, confirming that expert workers are well able to describe and define their occupation through task descriptions that tend to verify or reject course content and objectives. After a six-year period the business faculty proposed that the evaluation process become revitalized with the DACUM process preceded by an area occupational demand and labor market survey to clarify personnel needs in the specified programs.

During the grant period a program evaluation system was constructed with the following strategies: the labor market survey; the DACUM process; intensive reexamination of secondary and upper-division courses in the District ISDs and the neighboring universities; faculty teams exploring external accrediting agency requirements, internal policy and philosophy and trends portrayed by the discipline literature; follow-up studies of current graduates and completers; review of recent cooperative education training agreements; trends/requests from the field for continuing education upgrading-type courses; restructured advisory councils; student course evaluations; curriculum review by faculty Program teams; and assessment of reading, writing, and mathematical performance levels in each business course.

Utilizing a composite of all evaluations, the faculty confirmed the short- and long-term need for training in each of the following programs: real estate sales and brokerage, business management and office technology. Minimum competencies in each Program were verified; open-entry, open-exit options explored; new support services defined for entering and exiting students; a

2+2+2 articulation process and tools published and adopted by the College; a system for curriculum evaluation designed; new advisory committee members identified; present programs' syllabi updated; and two faculty members certified as DACUM facilitators.

This publication is designed to assist faculty in the revision of curriculum in business management, real estate and office technology programs. Each product emerged from the efforts of many dedicated educators using data collected from the DACUM process. The Labor Market Survey Report, DACUM Charts, Program Profiles the Task/Course Identification Forms and the 2+2+2 Articulation Plan may enable other community college faculty to reexamine, revise and communicate their present curricula and encourage administrators to support their efforts.

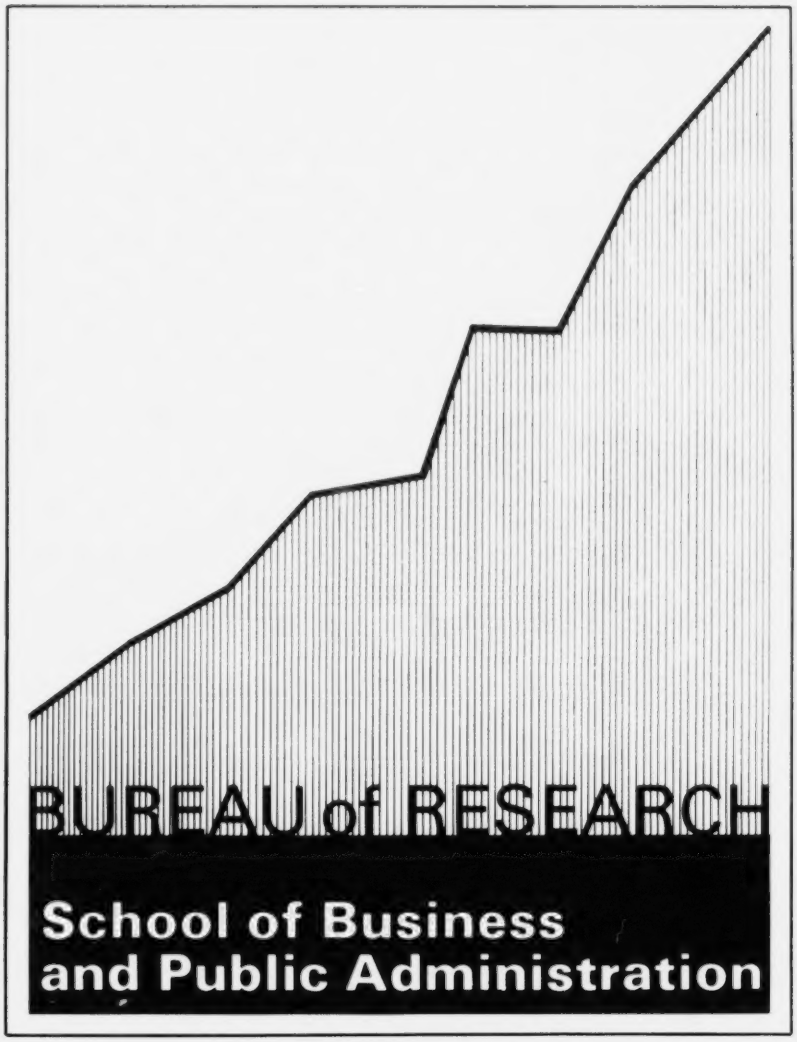
Dorothy Ellen McNutt

Dr. Dorothy Ellen McNutt
Project Director
June 30, 1988

LABOR MARKET SURVEY

OF SELECTED OCCUPATIONS

IN LOCAL AREA ESTABLISHMENTS



University of Houston

Clear Lake

2700 Bay Area Boulevard
Houston, Texas 77058-1098

Labor Market Survey of Selected Occupations in Local Area Establishments

A Study Conducted for
College of the Mainland
in Partial Completion of
Coordinating Board Postsecondary
Vocational Education Programs Grant

Survey and Report Completed by
Robert F. Hodgin, D.A.
and
Roberto Marchesini, Ph.D.
University of Houston - Clear Lake

Assisted by
Mary Ann Pringle
and
Karen Clement
College of the Mainland

May 1988

Executive Summary

A. Objective: To conduct a local labor market study focusing on the employment forecasts, educational requirements and professional requirements for seven selected occupations.

B. Method and Scope: A professionally prepared mail survey sent to 800 establishments in the Galveston County and and Clear Lake areas.

C. Results: Major results of importance include:

1. Most establishments (50 percent) expect business and employment to continue in an "as usual" fashion.
2. A significant minority (40 percent) of establishments foresee modest or greater increases in employment and competition.
3. Employee pursuit of higher education is encouraged twice as often as it is rewarded monetarily.
4. The more technical or closely regulated the occupation the greater the education and licensing requirements.

D. Recommendations: College of the Mainland should prepare its course offerings to meet the emerging demands in the service, office technology and management occupations.

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Labor Market Survey of Selected Occupations
in Local Area Establishments

Introduction and Background

The Division of Business at College of the Mainland strives to stay abreast of changing labor market requirements so that graduates from its programs are better suited to meet the needs of employers. One major evaluation used to assess such changing market conditions carries the acronym DACUM. The DACUM process is used to gather and distill information as well as to integrate results into the broader curriculum designs in the Division of Business. One component of the DACUM process involves the gathering of local labor market intelligence concerning recent employment trends and employer perspectives on various occupations. This report provides the lastest results from local labor market data collection.

Methodology and Scope

A validated written survey to personnel directors or the equivalent at local area establishments was chosen as the approach. The survey development was completed in two steps. The first entailed getting feedback from faculty at College of the Mainland. These faculty views about employment markets and their questions on potential employer perspectives provided the basis for the survey rough draft.

The second step permitted review of the draft questions as the faculty became validators of the survey questions. The final survey form questions fell into four logical parts. They are: market history and projections, establishment response to college training, specific occupational forecasts, and college or professional requirements for the occupations. The seven occupations chosen were the ones historically trained for in the Division of Business degree programs. They are: real estate sales agents, brokers and appraisers, service and administrative managers, office systems specialists and secretaries. The final version of the survey appears in Appendix A with the cover letter.

The survey questions were professionally typeset onto a letter-size page and accompanied by a cover letter appealing to the responder to help the college in its efforts to better serve future employment needs. The cover letter carried the signatures of the college president, division chair and the consultant as a representative of the university. A complimentary ticket to the college's theatre production was offered for those responding by a given date.

The geographic area chosen for the survey runs from the City of Galveston, up to but not including the City of Pasadena. Essentially, all of Galveston County and the northern part of what is considered the Clear Lake area became the focal point for distribution. An estimated 3,500 establishments (excluding single proprietorships) do business in the area according to the Texas Employment Commission.

A total of 800 survey forms were mailed to a cross-section of establishments by estimated size. The working lists of establishments were drawn from the Texas City-La Marque and Clear Lake Chambers of Commerce, governmental directories and other industry specific lists of firms. The mailing proceeded in two waves. The first mailout produced about 120 useable returns. Follow-up mailings were sent to another 200 non-responding establishments which brought total returns to 189 or about 23.5 percent. The overall sample size, as a fraction of the universe, equals 5.4 percent, which is well within acceptable bounds.

Results

The results discussion is divided into three parts. The first part reviews the responses to the six survey questions dealing with employment history and projections and establishment views on the value of college education in the workplace. The second part focuses on specific occupational forecasts. The final part deals with establishment views on college and professional requirements for the occupations. For each of the three parts, the discussion will center on the results in the aggregate. That is, all responses are taken together. Details of the data addressed in each part are available in Appendix B, where breakdowns of responses by major industry and by firm size are given. These breakdowns can be of significant value for guiding strategies in

future curricular initiatives, although they do not carry the same statistical reliability as the aggregated results.

The data in Table 1 summarize the sense of responders about their recent employment history, possible employment future and importance of advanced education. Easily half of the responding firms felt that the number of employees at their establishment had not changed much and would not change much. Only 20 percent of the responders had experienced employee reductions in the two years prior while 28 percent had actually recorded employee increases. Some 43 percent of the respondents foresee increases in employment over the next two years. Once again, about half of the firms surveyed thought that the level of competition locally had increased. A significant minority, 39 percent felt that the competitive pressures had not changed appreciably.

Over 70 percent on the reponders indicated that employees would be encouraged to attend courses or programs at College of the Mainland. Slightly more than a third said that employees are rewarded monetarily after completing a course of study. An equal percentage (35 percent) said no to the same question. One quarter of the respondents did not know how to answer.

Data in Table 2 focus on the occupational forecasts by the establishment respondents. Note that the forecasts are expressed as percentages of the number currently in each occupation. Employment in all seven occupations is expected to expand. Real Estate agents lead the way in percentage

terms but secretarial positions lead by actual count. The numbers for replacement versus new positions show a mixed pattern among the seven occupations. The encouraging aspect of the data is that expansion is anticipated across the board. This sentiment is consistent with responses to question three of the survey.

Educational requirements for the occupations are the focus of Table 3 data. Here the percentages are based on the total number of responders (189). The patterns for each occupation fairly well reflect established practice in the labor market. As an example, secretarial positions need no college coursework for 55 percent of the respondents and the percentages fall rapidly for each succeeding category of increased education. The same pattern holds for the office systems specialist, real estate broker and real estate agent. The real estate appraiser pattern of percentages across the educational classification rises, however. The appraising of property is a specialized skill requiring ever higher levels of training. State agencies are also adopting rules requiring advanced training or college degrees for these jobs. Managers show a mixed pattern of results. About 20 percent of the establishments accept persons with no advanced education for management positions. At the same time, about 20 percent of the establishments require a four-year degree. Only about 6 to 7 percent of the establishments require a two-year degree for a manager's position.

It was of interest to know the professional requirements of the seven occupations, as perceived by responders. Again, the pattern of responses was predictable and reflected practices in the various industries. Managers were required to have special training, degrees or credentials by at least half of the responding establishments. Secretaries could acquire a position at 21 percent of the establishments with only general knowledge skills but most (43 percent) required some sort of special training or skill. Office systems specialists, too, were required to have special training by some 28 percent of the establishments. Responses for the three real estate occupations were few for two reasons. First, real estate agencies were only a small fraction of the total industry sample taken. Second, the number of real estate positions per geographic area is small in relation to total employment. However, the responses reflect the known trend toward licensing of these professionals.

Discussion and Conclusions

Generally, the responses on the survey give rise to some optimism both on the general economy and the perceived value of education in the workplace. Although most establishments expect business to continue pretty much as usual, a significant minority of the enterprises look toward modest expansion and increased competition. While the pursuit of higher education is encouraged by most employers (70 percent)

monetary rewards follow only in a third of the cases. Graduates of programs would most probably have to change employers to have an opportunity for increased remuneration. For all seven occupations new positions, above replacements, are expected next year, although the percentage increases are likely to be small. One exception to this occurs with the real estate agent occupation, but here, total number of new agents will most likely be rather small. Both educational and professional requirements for the seven occupations generally reflect what is expected in an established labor market. That is, the more technical or more closely regulated the occupation, the higher the entry level training, education or licensing requirements.

The results of this survey should be placed into the larger context of regional and national employment trends. Regionally, the Gulf Coast is just emerging from the most severe recession since the 1930s. Some 244,000 jobs had been lost in the Texas Gulf Coast region alone between 1982 and 1986. State-wide unemployment is down to about 8.3 percent but still well above the current national unemployment of 5.9 percent as reported by the Texas Employment Commission.

The State of Texas Comptroller's Office predicts that 1988 will mark the year of economic transition for Texas. Forecasts for 1989 are cautiously optimistic and this optimism is apparently being felt by employers in the area. The economic slump that ravaged the region for the past four years is fading. The area economy has shifted measurably

from manufacturing into services and governmental industries. That shift is expected to continue, although some resurgence of manufacturing employment is also anticipated.

The opportunity for College of the Mainland lies in developing courses of study that will meet the rising employment demands, the trend toward more highly automated offices, and special market nuances unique to the college's service area. While the data in this report reveal certain facets of the changing occupational character for the area, there is little room for complacency as the economy begins its resurgence.

Table 1
Tabulation for Questions 1-6
Total Responses

Q1. How many people are employed at this establishment?

89	47%	A. < 10
24	13	B. 11-25
20	11	C. 26-50
19	10	D. 51-100
23	12	E. 101-500
13	7	F. > 500
1	1	No response
189	100%	Total

Q2. During the past two years, the number of employees at this establishment has:

10	5%	A. increased significantly
44	23	B. increased somewhat
98	52	C. remained about the same
28	15	D. decreased somewhat
8	4	E. decreased significantly
1	1	No response
189	100%	Total

Q3. For the next two years, the number of employees at this establishment is expected to:

13	7%	A. increase significantly
71	38	B. increase somewhat
101	53	C. remain about the same
2	1	D. decrease somewhat
1	1	E. decrease significantly
1	1	No response
189	100%	Total

Q4. Generally, the level of competition in the industry locally has:

93	49%	A. increased
9	5	B. decreased
73	39	C. remained about the same
12	6	D. not applicable
2	1	No response
189	100%	Total

Table 1 (Continued)

Q5. As College of the Mainland offers courses or programs that would help train your employees, would your employees be encouraged to attend?

134	71%	A. yes
16	8	B. no
36	19	C. not sure
3	2	No response
189	100%	Total

Q6. Once an employee completes a college course of study or earns a degree are they rewarded with increased compensation?

66	35%	A. yes
67	35	B. no
47	25	C. do not know
9	5	No response
189	100%	Total

Table 2
Employment Forecast by Occupation
Total Responses*

Occupation	No. Currently Employed	No. Replacement Positions for Next Year	No. New Positions Next Year
Manager for Service Ind.	583	44 (7.5%)	18 (3.1%)
Manager for Admin. Supp.	924	48 (5.2%)	18 (1.9%)
Office Sys. Specialist	156	20 (12.8%)	14 (9.0%)
Real Estate Broker	69	4 (5.8%)	9 (13.0%)
Real Estate Appraiser	16	3 (18.8%)	1 (6.3%)
Real Estate Sales Agent	143	13 (9.1%)	35 (24.5%)
Secretary	1256	150 (11.9%)	40 (3.2%)

*Percentages are based on the number currently employed for each occupation.

Table 3
Educational Requirements by Occupation
Total Responses*

Occupation	No College Required	College Coursework	2-Year Degree	4-Year Degree
Manager for Service Ind.	37 (19.6%)	26 (13.8%)	11 (5.8%)	53 (28%)
Manager for Admin. Supp.	38 (20.1%)	19 (10.1%)	13 (6.9%)	39 (20.6)
Office Sys. Specialist	33 (17.5%)	15 (7.9%)	11 (5.8%)	7 (3.7%)
Real Estate Broker	5 (2.6%)	6 (3.2%)	1 (0.5%)	10 (5.3%)
Real Estate Appraiser	3 (1.6%)	1 (0.5%)	4 (2.1%)	6 (3.2%)
Real estate Sales Agent	6 (3.2%)	7 (3.7%)	1 (0.5%)	6 (3.2%)
Secretary	104 (55.0%)	17 (9.0%)	7 (3.7%)	2 (1.1%)

*Percentages are based on 189 total responses and do not total to 100% by row due to the existence of non-responders.

Table 4
Professional Requirements by Occupation
Total Responses*

Occupation	General Knowledge Required	Special Skills or Training Required	Special License or Credentials Required
Manager for Service Ind.	13 (6.9%)	72 (38.1%)	47 (24.9%)
Manager for Admin. Supp.	17 (9.0%)	70 (37.0%)	23 (12.2%)
Office Sys. Specialist	7 (3.7%)	53 (28.0%)	6 (3.2%)
Real Estate Broker	3 (1.6%)	3 (1.6%)	19 (10.1%)
Real Estate Appraiser	1 (0.5%)	3 (1.6%)	11 (5.8%)
Real Estate Sales Agent	2 (1.1%)	3 (1.6%)	18 (9.5%)
Secretary	40 (21.2%)	83 (43.9%)	10 (5.3%)

*Percentages are based on 189 total responses and do not total to 100% by row due to the existence of non-repsponders.

Appendix A

Division of Business

COLLEGE OF THE MAINLAND
8001 Palmer Highway
Texas City, Texas 77591

Bureau of Research
School of Business and Public Administration
University of Houston-Clear Lake
2700 Bay Area Boulevard
Houston, Texas 77058

Dear Employer:

We need your help to know more about the occupational growth and knowledge requirements in your industry. Only through you can we learn the qualifications our students must demonstrate to be employable in tomorrow's job market.

The enclosed survey is designed for ease of completion. The form should be filled-in by someone familiar with staffing needs at your establishment. Confidentiality is assured as results will be reported only in summary form by industry. Should you have questions regarding the survey you may contact Ms. Mary Ann Pringle, College of the Mainland (713-938-1211 ext. 311) or Dr. Robert F. Hodgin, University of Houston-Clear Lake (713-488-9430).

Please note March 31, 1988, as the return date for the mailable form. Thank you for participating with us to better meet the staffing needs of your business.

Cordially,

Mr. Larry Stanley
President
College of the Mainland

Dr. Dorothy E. McNutt
Chair, Division of Business
College of the Mainland

Dr. Robert F. Hodgin
Associate Professor of Economics
UH-Clear Lake

P.S. With our thanks, those returning the forms by March 31, 1988, will receive complimentary tickets to College of the Mainland's current theatre production.

REGIONAL EMPLOYMENT AND EDUCATIONAL REQUIREMENTS SURVEY

Please provide your title: _____

1. How many people are employed at this establishment? (check one)
   - ☐ a. less than 10
   - ☐ b. 11 - 25
   - ☐ c. 26 - 50
   - ☐ d. 51 - 100
   - ☐ e. 101 - 500
   - ☐ f. over 500
2. During the past two years, the number of employees at this establishment has: (check one)
   - ☐ a. increased significantly
   - ☐ b. increased somewhat
   - ☐ c. remained about the same
   - ☐ d. decreased somewhat
   - ☐ e. decreased significantly
3. For the next two years, the number of employees at this establishment is expected to: (check one)
   - ☐ a. increase significantly
   - ☐ b. increase somewhat
   - ☐ c. remain about the same
   - ☐ d. decrease somewhat
   - ☐ e. decrease significantly
4. Generally, the level of competition in the industry locally has: (check one)
   - ☐ a. increased
   - ☐ b. decreased
   - ☐ c. remained about the same
   - ☐ d. not applicable
5. As College of the Mainland offers courses or programs that would help train your employees, would your employees be encouraged to attend? (check one)
   - ☐ a. Yes
   - ☐ b. No
   - ☐ c. Not sure
6. Once an employee completes a college course of study or earns a degree are they rewarded with increased compensation? (check one)
   - ☐ a. Yes
   - ☐ b. No
   - ☐ c. Do not know
7. Please note how College of the Mainland might better serve the education and training needs of your employees.

   _____

   _____
8. I wish to receive a summary of the results. (check one)
   - ☐ a. Yes
   - ☐ b. No

AFTER COMPLETING SURVEY, PLEASE FOLD AND STAPLE

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Texas City, Texas
77591

BUSINESS REPLY MAIL NO POSTAGE NECESSARY IF MAILED IN THE UNITED STATES

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DIVISION OF BUSINESS

college of the mainland

8001 Palmer Highway, Texas City, Texas 77591

INSTRUCTIONS: For each job title relevant to your establishment, respond to the questions in Category I, II and III.

Job Titles (SEE DESCRIPTIONS BELOW)	CATEGORY I EMPLOYMENT FORECAST (ENTER A NUMBER IN EACH COLUMN)				CATEGORY II COLLEGE REQUIREMENTS (CHECK ONE COLUMN PER JOB TITLE)				CATEGORY III PROFESSIONAL REQUIREMENT(S) (CHECK ONE COLUMN PER JOB TITLE)		
	Number Currently Employed	Number of Replacement Positions Next Year	Number of New Positions Next Year	Not Applicable	No College Required	College Coursework Only	Two-Year College Degree	Four-Year College Degree	General Knowledge Only Required	Specific Skills or Training Required	Specific Credentials or License Required
A. Manager/ Supervisor for Service Industry	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
B. Manager/ Supervisor for Administrative Support	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
C. Office Systems Specialist	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
D. Real Estate Broker	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
E. Real Estate Appraiser	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
F. Real Estate Sales Agent	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
G. Secretary	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

JOB DESCRIPTIONS:

A. **Manager/Supervisor for Service Industry** - Generally found in smaller establishments and performs both supervisory and management functions such as accounting, marketing and personnel work.

B. **Manager/Supervisor for Administrative Support** - Directly supervises and coordinates the activities of clerical and administrative support workers.

C. **Office Systems Specialist** - Able to maintain all office systems such as records management, word processing, mailings, appointments and office callers.

D. **Real Estate Broker** - Sells real estate, rents and manages property, makes appraisals, arranges for loans and holds a license for such.

E. **Real Estate Appraiser** - Appraises improved or unimproved real property to determine its value for purchase, sale, loan or mortgage purposes and holds a license for such.

F. **Real Estate Sales Agent** - Sells, rents and buys real property to clients on a commission basis and holds a license for such.

G. **Secretary** - Schedules appointments, takes calls and dictation, types routine correspondence, reads and routes incoming mail and performs other clerical duties.

Appendix B

Table 5
Tabulation for Questions 2-6
by Employer Category*

SIZE CATEGORY - Less than 10

Response	2		3		4		5		6	
NR	0	0%	0	0%	1	1%	1	1%	5	6%
A	2	2	2	2	47	53	59	66	29	33
B	23	26	41	46	4	4	6	7	22	25
C	54	61	46	52	34	38	23	26	33	37
D	8	9	0	0	3	3	0	0	0	0
E	2	2	0	0	0	0	0	0	0	0
Total	89	100%	89	100%	89	100%	89	100%	89	100%

SIZE CATEGORY - 11-25

Response	2		3		4		5		6	
NR	0	0%	0	0%	0	0%	0	0%	1	4%
A	2	8	1	4	11	46	20	83	5	21
B	4	17	6	25	0	0	2	8	12	50
C	14	58	17	71	9	38	2	8	6	25
D	4	17	0	0	4	17	0	0	0	0
Total	24	100%	24	100%	24	100%	24	100%	24	100%

SIZE CATEGORY - 26-50

Response	2		3		4		5		6	
NR	0	0%	0	0%	0	0%	0	0%	1	5%
A	2	10	4	19	10	48	15	71	11	52
B	3	14	4	19	2	10	2	10	6	29
C	12	57	12	57	7	33	4	19	3	14
D	3	14	1	5	2	10	0	0	0	0
E	1	5	0	0	0	0	0	0	0	0
Total	21	100%	21	100%	21	100%	21	100%	21	100%

Table 5 (Continued)

SIZE CATEGORY - 51-100

Response	2		3		4		5		6	
NR	0	0%	0	0%	0	0%	0	0%	0	0%
A	2	11	1	5	9	47	17	89	10	53
B	5	26	9	47	0	0	2	11	7	37
C	7	37	8	42	9	47	0	0	2	11
D	3	16	1	5	1	5	0	0	0	0
E	2	11	0	0	0	0	0	0	0	0
Total	19	100%	19	100%	19	100%	19	100%	19	100%

SIZE CATEGORY - 101-500

Response	2		3		4		5		6	
NR	0	0%	0	0%	0	0%	1	4%	1	4%
A	1	4	4	17	10	43	15	65	4	17
B	6	26	7	30	1	4	3	13	15	65
C	8	35	12	52	10	43	4	17	3	13
D	7	30	0	0	2	9	0	0	0	0
E	1	4	0	0	0	0	0	0	0	0
Total	23	100%	23	100%	23	100%	23	100%	23	100%

SIZE CATEGORY - Over 500

Response	2		3		4		5		6	
NR	0	0%	0	0%	0	0%	0	0%	0	0%
A	1	8	1	8	6	46	9	69	7	54
B	3	23	4	31	2	15	1	8	5	38
C	4	31	7	54	5	38	3	23	1	8
D	3	23	0	0	0	0	0	0	0	0
E	2	15	1	8	0	0	0	0	0	0
Total	13	100%	13	100%	13	100%	13	100%	13	100%

* NR means non-responder. Percentages are based on the number of returns per size category.

Table 6
Tabulation for Questions 1-6
by Industry Classification*

INDUSTRY CLASSIFICATION - Manufacturing

Response	1		2		3		4		5		6	
NR	0	0%	0	0%	0	0%	0	0%	1	3%	0	0%
A	9	27	4	12	7	21	15	45	25	76	12	36
B	0	0	10	30	16	48	2	6	3	9	14	42
C	3	9	10	30	9	27	14	42	4	12	7	21
D	6	18	6	18	1	3	2	6	0	0	0	0
E	10	30	3	9	0	0	0	0	0	0	0	0
F	5	15	0	0	0	0	0	0	0	0	0	0
Total	33	100%	33	100%	33	100%	33	100%	33	100%	33	100%

INDUSTRY CLASSIFICATION - Wholesale and Retail

Response	1		2		3		4		5		6	
NR	0	0%	0	0%	0	0%	0	0%	0	0%	1	4%
A	13	52	0	0	2	8	16	64	19	76	10	40
B	3	12	4	16	11	44	2	8	2	8	3	12
C	3	12	13	52	11	44	7	28	4	16	11	44
D	2	8	6	24	1	4	0	0	0	0	0	0
E	3	12	2	8	0	0	0	0	0	0	0	0
F	1	4	0	0	0	0	0	0	0	0	0	0
Total	25	100%	25	100%	25	100%	25	100%	25	100%	25	100%

INDUSTRY CLASSIFICATION - Finance, Insurance and Real Estate

Response	1		2		3		4		5		6	
NR	0	0%	0	0%	0	0%	0	0%	0	0%	3	6%
A	32	64	1	2	1	2	27	54	35	70	17	34
B	10	20	13	26	18	36	2	4	1	2	20	40
C	7	14	28	56	30	60	21	42	14	28	10	20
D	0	0	7	14	0	0	0	0	0	0	0	0
E	0	0	1	2	1	2	0	0	0	0	0	0
F	1	2	0	0	0	0	0	0	0	0	0	0
Total	50	100%	50	100%	50	100%	50	100%	50	100%	50	100%

Table 6 (continued)

INDUSTRY CLASSIFCIATION - Services

Response	1		2		3		4		5		6	
NR	1	2%	1	2%	1	2%	2	4%	2	4%	3	6%
A	23	44	5	10	2	4	22	42	35	67	21	40
B	8	15	12	23	17	33	2	4	8	15	17	33
C	4	8	29	56	32	62	21	40	7	13	11	21
D	6	12	4	8	0	0	5	10	0	0	0	0
E	6	12	1	2	0	0	0	0	0	0	0	0
F	4	8	0	0	0	0	0	0	0	0	0	0
Total	52	100%	52	100%	52	100%	52	100%	52	100%	52	100%

INDUSTRY CLASSIFCIATION - All Other

Response	1		2		3		4		5		6	
NR	0	0%	0	0%	0	0%	0	0%	0	0%	2	7%
A	12	41	0	0	1	3	13	45	20	69	6	21
B	3	10	5	17	9	31	1	3	2	7	13	45
C	3	10	18	62	19	66	10	34	7	24	8	28
D	5	17	5	17	0	0	5	17	0	0	0	0
E	4	14	1	3	0	0	0	0	0	0	0	0
F	2	7	0	0	0	0	0	0	0	0	0	0
Total	29	100%	29	100%	29	100%	29	100%	29	100%	29	100%

* NR means non-responder. Percentages are based on the number of returns per industry classification.

Table 7
Comments for Question 7

Question 7. Please note how College of the Mainland might better serve the education and training needs of your employees.

1. Registered animal technician training
2. Open class to public instead of Union
3. Need qualified fence installers. Call for guidelines.
4. Wants info. on types of training on design, layout & printing.
5. Superv. training (6 wk. course) for Mgt. skills/CEV certificate/credit
6. 4 yr. course in Plant Oper. Skill Train.
7. Need training in ADA and ADABASE
8. Co. now located in Titsville, FL.
9. Technical Mgr. train & system Engineering
10. Provide excellent education for senior college
11. Other Mgr. Truck driving training.
12. Our industry provides training for employees; from people/w experience & skills.
13. Better opportunity for advancement.
14. PC and Management seminars.
15. Stress Academic Excellence.
16. Basic skills and electives.
17. More fashion merchandising and retail sales courses.
18. Food service. Sanitization and small equip. operations.
19. Trained toward finding better paying job elsewhere.
20. Needs are primarily vocational and includes sales and register operations.
21. Offer Horticulture studies.
22. Course in collections.
23. Training seminar with Texas Credit Union League.
24. COM already providing Credit Union & Financial courses.
25. Employee take business courses at COM.
26. Doing well by providing Credit Union courses.
27. Credit courses in CLU designation (Bob Rayburn 480-4767 for info).
28. Doing good job.
29. Provide courses that comply with "CETA" requirements.
30. Insurance educational courses.
31. Continue credit & cont. ed programs for Real Estate.
32. Continue to offer week-end Real Estate course in NASA area.
33. Real Estate courses are required to maintain a license with the state.
34. Doing good job; satisfied with current program.
35. Hospitality in evening course studies.
36. More training in the Sales field.
37. Repair car and boat motors, employees factory trained.
38. Continue to offer needed courses.
39. Seminars/Workshops; Nights/ Week-ends
40. Provide us with schedules frequently.
41. COM should develop a program in Dental Hygiene, not in Cosmetology.
42. PC instructional courses at max utility of PC in small bus.
43. LVN program
44. Students need practical experience in clerical duties.
45. COM meets in the needs of Child Development courses.
46. Continue refresher course in communications, secre., & adm. skills
47. More night course at local high-school campuses.
48. Extension course at Clear Lake or Creek in Computer Sciences.
49. Employees have Bach. or Adv. Tech. Degree.
50. Courses in computer aid/design training.
51. Courses in Hotel/Motel management.
52. Also teach basic learning skills

Table 7 (continued)

53. Courses need to be integrated with emphasis on JOB EXPERIENCE.
54. Law enforcement courses.
55. Computer training.
56. Offer additional Health Care courses.
57. Possible only if office receives computer (not likely).
58. More night and week-end courses.
59. Training along lines of the Marine industry.
60. Curriculum is adequate for our employees.
61. Small business seminars: how to design catalogs for a small business.
62. More short-term cont. ed classes relating to office procedure, prof. image, cust. relation, etc.
63. Night courses in business organ. & secr. skills.
64. HP-ILC Calculator courses.
65. Teach "How to operate small business" class; most know trade, but lack business knowledge.
66. Paramedics & EMT's take recertification courses at COM
67. COM's currently working with Sherry Davis as part of STSOC.
68. Emphasize practical use of "formal training" from college courses.
69. Cont. Ed. refresher courses for nursing students.
70. Continue to send class schedules & other important information.
71. Provide literature on class & training on an ongoing basis.

Curriculum Improvement Project

Business Manager Program Profile

Developed by William M. Tapp, Ed.D.
with cooperation from area Expert Workers

Prepared by
College of the Mainland

Through a Grant from Coordinating Board
Texas College and University System
PVEP 88-1030-20
Project Director: Dorothy E. McNutt, Ed.D.
Project Coordinator: Maryann Pringle
June 30, 1988

INTRODUCTION

Most educators would agree that the development of curriculum for a college program requires the synthesis of several sources of input. These sources might include: peers, other college programs, advisory committees, practitioners, current texts and other literature and research, a local needs assessment with a view toward the future developments and movements in the industry, etc. The purpose of multiple sources is to avoid a tunnel vision approach to program development.

The College of the Mainland is currently involved in curriculum improvement and necessary curriculum redesign for the Business Management program in an effort to attain a program which is exemplary and on the cutting edge of practice and theory. To help with our study a grant was secured by the Chairperson, of the Division of Business, which funded the examination of one of the sources of input. The funds were used to complete a DACUM (DACUM is an acronym which stands for developing a curriculum) process for the Business Management program at the college. The result of the DACUM process is contained in this booklet.

The DACUM process itself utilized managers from the communities in the College of the Mainland district. These managers participated in a two-day workshop and identified eleven specific duties which they, as managers, performed within the scope of their businesses management responsibilities. These duties were broken down into parts and were termed tasks. All tasks in each class therefore can be used collectively to describe a duty.

The grant also required the development of teaching strategies for each of the identified tasks. A sample procedure for teaching each of the identified tasks is presented on the following pages. You will note that the teaching strategies for some tasks are referenced to other tasks. This is due to the somewhat overlapping nature of some tasks. Further some tasks are referenced to coop (cooperative education classes provide college credit to students who work in a job with the approval of the advisor or department chairperson) classes since it is believed that these individual tasks would best be presented in a coop setting.

It should not be presumed that the curriculum which follows would constitute an entire program since it only reflects one single source, practitioners. Rather, one should consider these tasks as those which may be included an a general management curriculum. Further it should not be assumed that the teaching strategies which are presented for each task represent the best, only or most desirable strategies in all cases. For the best strategy is necessarily dependent upon the teacher, the student

and the environment as well as many other factors. Therefore, the teaching strategies presented for each task represent one possible method of instruction. Some professors may feel that they wish to utilize the entire strategy as it is presented. Other professors may wish to use only selected parts of a presented teaching strategy and still others may find the greatest value is obtained by utilizing the tasks and teaching strategies as points of orientation from which a professor might develop alternate teaching strategies.

Dr. William M. Tapp, Ed.D.

BUSINESS MANAGER
DACUM CHART

College of the Mainland
Division of Business
February 5, 1988

Business Manager

	DUTIES	Task Statements								
A	Develope Business Objectives	Evaluate Market A1	Put Together a "Game Plan" A2	Prepare Budget to Meet Business Objectives A3	Set Short Term Goals A4	Set Long Term Goals A5	Evaluate Previous Year's Activities A6			
B	Maintain Lines of Communciation	Visit Work Station B1	Maintain Open Door Policy B2	Listen to Employees and Customers B3	Read Written Correspondence From Employees & Customers B4	Keep Confidentiality If Asked B5	Respond to Imput Appropriately B6	Share Business Objectives & Results with Employees B7		
C	Hire Employees	Determine Employees Needs C1	Locate Qualified Applicants C2	Determine Job Requirements C3	Develop and Maintain Adequate Application Form C4	Review and Evaluate Completed Application C5	Interview Qualified Applicants C6	Perform Background Checks C7	Screen Applicants as Needed for Job C8	Select Employee C9
		Maintain Paper Trail C10	Reject Unselected Applicants C11							
D	Discharge Employees	Determine Reason for Discharge D1	Investigate Reason for Discharge D2	Document Reason for Discharge D3	Evaluate for Consistency of Discipline D4	Inform Employee of Action D5	Collect Company Property D6	Process Final Paperwork D7		
E	Administer Office Procedures	Read Business and Related Materials E1	Review Statistical/ Financial Report & Analyze Data E2	Compare and Interpret Data E3	Share/Report Relevant Data E4	Take Required Action E5	Follow-up as Necessary E6			
F	Train Employees	Communicate Company Image, Policies & Safety Procedures F1	Outline Job Duties F2	Identify Specific Procedures Per Task F3	Teach Specific Procedures Per Task F4	Observe & Verify Comprehension of Job Duties F5	Evaluate and Correct Employee Performance F6	Retrain as Needed F7		
G	Develop Employees	Assess Strengths and Weaknesses G1	Identify Employees Objectives G2	Outline Plan to Strengthen Weaknesses G3	Reinforce Strengths G4	Provide Experience in Various Job Strengths G5	Determine Mutual Objectives Within Organization G6	Provide Continuous Guidance G7	Recognize/Reward Job Performance G8	
H	Plan Long Range Employee Schedules	Determine Basic Staff Requirements H1	Anticipate Changes in Staffing Needs H2	Review Budget H3	Adjust Staff Accordingly H4					
I	Service Customer	Identify Customer I1	Determine Customer Needs I2	Provide Goods and Services to Meet Needs I3	Promote Goods and Services I4	Provide Customer Incentives I5	Use Follow-Up Procedures I6			
J	Conduct and Refine Daily Work Flow	Prioritize Activities J1	Delegate Responsibilities J2	Direct and Follow-Up on Activities J3	Identify Problems J4	Solve Problems (People, Equipment, Business, etc...) J5				
K	Purchase for Company Needs	Determine Specific Quality and Needs K1	Evaluate Costs K2	Justify Expenditure K3	Complete Transaction K4	Verify Receipt of Goods K5				

KNOWLEDGE & SKILLS

Visual and Written Communication Skills
Listening Skills
Personnel Relations
Related Business/Product Knowledge
Fill Any Function When Needed
Technical Knowledge Appropriate to Field
Basic Knowledge of Governmental Regulations Related to Business

REWARDS

Money
Ego Gratification/Self Satisfaction
Helping People Become Who They Can Be
Leave An Impression
Freedom to Express Yourself in What You Do
Recognition Within the Company and in the Community
Opportunities to Translate Skills to Other Needs

EQUIPMENT TOOLS

Complex Telephone System
Adding Machines
Computer System - General Knowledge
Business Specific Equipment

FUTURES

More Sensitive to People Needs
Close to Work Force
Less Managers of Managers
More Automation
More People with less Managers - Larger Span of Control

ATTITUDE/TRAITS

Not Too Opinionated
Open Minded/Adaptable to Change
Open to New Ideas
Willingness to Continue Education
Sense of Humor, Compassion, Empathy
Honesty/Integrity
Decision Making Capabilities
Not Afraid to Make Mistakes
Creative
Gutsy
Survivor Instinct
Resilient
Tactful
Quick Study
Good Judgment

BUSINESS MANAGER PANEL

Jane A. Baucum - Jane's Etcetra
Tommie Cambell - Formerly of Montgomery Wards
Robert Duke - Edison Brother's Shoe Stores, Inc.
Phil Hall - Marathon Petroleum
Andy Hernandez - Benito's Mexican Restaurant
Adele Spencer - Gulf Coast Waste Disposal Authority
Eileen Wheaton - Formerly of Eiband's Department Stores
Vincent Wyche - Duraclean

FACILITATORS

Dr. Mary Brumbach
Linda Lee

DUTY - DEVELOP BUSINESS OBJECTIVES

TASK

A. EVALUATE MARKET

1. Demonstrate survey methods to students
2. Introduce students to business information resources
   a. Business Periodicals Index
   b. Standard and Poors
   c. Value Line
   d. Etc.
3. Have students design a market survey
4. Have students administer their market survey
5. Have students analyze survey results and compare to literature
6. Evaluate student performance

B. PUT TOGETHER A "GAME-PLAN"

1. Present the concept of strategic (long-term) planning
2. Present the concept of tactical (short-term) planning
3. Give students a procedure for planning
   a. Determine goal or objective
   b. Prepare a set of alternative strategies
   c. Select most appropriate strategies
      1. Consider time frames
      2. Evaluate economic and/or political limitations
      3. Consider negatives for each solutions
   d. Determine controlling follow-up strategies and time frames, assign duties to proposed company employees
4. Assign students a case which contains a planning deficiency
5. Review student case reports and stress the need to have integrated plans so that short-range plans support long-range plans, and both short and long range plans achieve the objectives of the organization

C. PREPARE BUDGET TO MEET BUSINESS OBJECTIVES

1. Present PERT chart analysis
2. Allow students to break-up a business task into its basic or component jobs (as if it were to be placed into a PERT chart
3. Have students assign personnel and physical resources to each component job
4. Have students assign costs for each component job
   a. Determine costs of physical resources
   b. Calculate wage and salary expense
5. Consult a local contractor and have him estimate the cost of the business task
6. Compare the costs proposed by the students with the estimate of the contractor
7. Evaluate student performance

D. SET SHORT TERM GOALS

See "B" above

E. SET LONG TERM GOALS

See "B" above

F. EVALUATE PREVIOUS YEAR'S ACTIVITIES

1. Present the managerial function of controlling
2. Present planning strategy (see "B" above)
3. Present the concepts of corporate goals and corporate missions
4. Assign students a case where corporate goals, corporate missions and financial data are presented - allow students to determine the success of the firm in terms of the corporate goals, corporate missions, and the financial plans set forth by the management of the firm
5. Evaluate student performance

DUTY - MAINTAIN LINES OF COMMUNICATION

TASK

A. VISIT WORK STATION

1. Have students research one particular industry -(i.e. fast food, retail)
2. Select a business operation to visit
3. Have manager describe / define one of the jobs at his company
4. Request a job description from the manager of the firm to be visited
5. Visit the selected company and evaluate the employee's performance according to the manager's description and the job description as posted by the firm
6. Have students prepare a report on their observations at the work site and compare literature with actual performance of employees on the job
7. evaluate student performance

B. MAINTAIN OPEN DOOR POLICY

1. Demonstrate through case work the necessity to have managers respond to employees needs, and customer requests and complaints and to emphasize that managers should assume an advocate role with regard to addressing customer concerns and employee work related problems
2. Discuss concept with store manager of visited firm

C. LISTEN TO EMPLOYEES AND CUSTOMERS

* See "B" above

D. READ WRITTEN CORRESPONDENCE FROM EMPLOYEES AND CUSTOMERS

* See "B" above

D. KEEP CONFIDENTIALLY IF ASKED

1. Present the concept of ethics
2. See "B" above

E. RESPOND TO INPUT APPROPRIATELY

1. Discuss the appropriate use of suggestion boxes
2. Have each student write a memo in response to an imaginary suggestion (i.e. clean up rest room, the desire for a company or department picnic etc.)
3. Have students read memo to the other students in class
4. Have classmates vote on a 1 to 10 scale on their reactions to the memo (i.e. anger, surprise, attitude)
5. Compare student reactions to that of the student who wrote the memo as well as to the other students in the class
6. Show that communications are not always as clear to the receiver as they seem to be to the sender

F. SHARE BUSINESS OBJECTIVES AND RESULTS WITH EMPLOYEES

1. Present the concept of Management By Objectives (ref. Latham, G.P., Mitchell, T.R., Dossett, D.L., "Importance of Participative Goal Setting and Anticipated Rewards on Goal Difficulty and Job Performance," Journal of Applied Psychology, April 1978, p. 163-171)
2. Construct a company for demonstration purposes (i.e. Sell pencils to other students in the school, create some unique art work using only loose leaf paper and a ball point pen)
3. Have students assume various positions within the firm (i.e. shift foreman, general manager, working employee)
4. Present general company objectives to be accomplished by the student-managers (i.e. sell a certain quantity of pencils, produce a certain quantity or quality of art)
5. Have student-managers meet with student-workers and determine production objectives
6. Evaluate company performance with regard to successful completion of departmental and general company objectives

DUTY - HIRE EMPLOYEES

TASK

A. DETERMINE EMPLOYEE NEEDS

1. Present the concept of organizational structure
   a. Unity of command
   b. Span of control
   c. Corporate policy
   d. Job descriptions
   e. Authority
   f. Accountability
   g. Responsibility
2. Create a firm which provides a service or product
3. Propose a sales level
4. Have students outline the jobs required for the firm
5. Have students prepare a job analysis
6. Have students prepare an organizational chart
7. Have students exchange results and discuss reasoning

B. LOCATE QUALIFIED APPLICANTS

1. Present the concept of recruiting
   a. External recruiting
   b. Internal recruiting
2. Present the concept of employment testing
3. Complete "A" above
4. Present interviewing strategies
5. Utilize a role-playing format
   a. Have students determine needs for a specific job which is provided by the instructor
   b. Assign certain qualifications - lists to selected students in class
   c. Select three students to represent the interviewer
      1. Each student-interviewer should select the "best" candidate for the position
      2. After all student-interviewers have selected their "best" candidate the class should discuss

C. DETERMINE JOB REQUIREMENTS

* See "A" above

D. DEVELOP AND MAINTAIN ADEQUATE APPLICATION FORM

1. Review selected legislation
   a. Equal Pay Act of 1963 amended 1972
   b. Civil Rights Act of 1964 amended 1972
   c. Age Discrimination in Employment Act 1967 amended 1978
   d. Occupational Safety and Health Act of 1970
   e. Rehabilitation Act of 1973
   f. Federal Privacy Act of 1974
   g. Employee Retirement Income Security Act of 1974
   h. Pregnancy Discrimination Act of 1978
   i. Civil Service Act of 1978
2. Review EEOC guidelines
3. Review local employment application forms for compliance with federal legislation and guidelines

E. REVIEW AND EVALUATE COMPLETED APPLICATION

* See "A" above

F. INTERVIEW QUALIFIED APPLICANTS

1. See "A-1" and "A-2" above
2. See "B-5" above
3. Present interview styles
   a. Structured
   b. Unstructured
4. Present the idea of the use of multiple sources of information to help eliminate bias on the part of a single interviewer

G. PERFORM BACKGROUND CHECKS

1. Present the concept of credential fraud (ref. Cooper, K.C., "Those 'qualified' applicants and their phony credentials," Administrative Management, August 1977., Rickard, S.T., "Effective staff selection," Personnel Journal, June, 1981.
2. Discuss polygraph (lie detector) and its use in verifying background information
3. Discuss letters of recommendation and their value

H. SCREEN APPLICANTS AS NEEDED FOR JOB

1. See "A-4" and "A-5"
2. See "B-4" and "B-5"
3. See "D-2"
4. Present the concept of an interviewers rating scale
5. Have students prepare their own interviewing rating scale instrument (ref. College Placement Annual, 1986, 20)
6. Role-play -- Instructor should select one student to represent a potential applicant - All other students in the class should evaluate the student-applicant using the interviewing rating instrument
7. Discuss students' results
8. Explain the value of multiple sources of input

I. SELECT EMPLOYEES

1. Review EEOC guidelines (ref. Dhanens, T.P., "Implications of the New EEOC Guidelines," Personnel, September 1979, p. 32-39) (ref. Higgins, J. M., "A Managers Guide to the Equal Employment Opportunity Laws," Personnel Journal, August 1976, p. 406-412)
2. Discuss matching employees with jobs (ref. Heflich, D. L., "Matching People and Jobs: Value systems and Employee Selection, Personnel Administration, January 1981, p. 77-85)
3. See "A-4" and "A-5"
4. See "B-4" and "B-5"
5. See "D-2"
6. Review selection process
   a. Preliminary interview
   b. Application
   c. Administer testing
   d. Interview
   e. Check references
   f. Physical examination (if candidate is selected)

J. MAINTAIN PAPER TRAIL

1. Present EEOC guidelines
2. Introduce the concept of consistency when dealing with candidates (treat all the same)
3. Have students prepare a selection process similar to "I-4" above
4. Have several students interview a student-applicant and keep records on their findings
5. Compare student results
6. Emphasize need for adequate and accurate paper trail

K. REJECT UNSELECTED APPLICANTS

1. See "A-4" and "A-5"
2. See "B-4" and "B-5"
3. See "D-2"

DUTY - DISCHARGE EMPLOYEES

TASK

A. DETERMINE REASON FOR DISCHARGE

1. Present a process for termination
2. Present reasons for termination
   a. Retirement (ref. Age Discrimination in Employment Act 1967, 1978)
      (ref. Copperman, L.F. & Keast, F.D., "Older Workers: A Challenge for Today and Tomorrow," Human Resource Management, Summer 1981, p.13-18.)
   b. Economics
   c. Poor performance
3. Present the process of a grievance procedure (ref. Bedeian, A.G., Management, Dryden Press, Chicago, 1986. p. 421-423)
4. Present EEOC guidelines
5. Comment on the necessity for proper documentation in termination cases (ref. you may utilize local company processes or the process at the school)
6. Have students research in the library or with local companies examples for each of the above mentioned reasons for discharge examples should include
   a. Type of firm
   b. Background of case
   c. Reason for discharge
   d. Final disposition if different than termination or if legal action was sought by employee

B. INVESTIGATE REASONS FOR DISCHARGE

* See "A" above

C. DOCUMENT REASON FOR DISCHARGE

* See "A" above

D. EVALUATE FOR CONSISTENCY OF DISCIPLINE

* See "A" above

E. INFORM EMPLOYEE OF ACTION

* See "A" above

F. COLLECT COMPANY PROPERTY

* This is difficult to perform without being in the management position or his delegate - best presented through a guest or a coop experience

G. PROCESS FINAL PAPERWORK

* See "A" above

DUTY - ADMINISTER OFFICE PROCEDURES

TASK

A. READ BUSINESS AND RELATED MATERIALS

1. Introduce students to the need for business managers to read business publications to maintain awareness of the new trends in business
2. Have students visit the library as a class and have the reference librarian demonstrate the business publications in house as well as demonstrate the use of the Readers Guide to Periodic Literature, the Business Periodicals Index, and other business reference sources
3. Assign a business oriented problem to students (i.e. how to plan a new training program for employees, what is the current thought on employee turnover, where to invest excess profits for a short term)
   a. Require students to utilize library facilities
   b. Require a minimum of three to four reference sources
   c. Require a written report of three to five pages presenting a response or solution to the presented question or problem
4. Evaluate student written report for completeness of response to the topic or question to be addressed
5. Allow students to present findings to the class and each student (or small group of students) may lead a discussion and answer questions directed toward their answer or solution

B. REVIEW STATISTICAL / FINANCIAL REPORT AND ANALYZE DATA

1. Present the concept of supply and demand
2. Present pricing strategies
   a. Penetration pricing
   b. Price skimming
3. Present the concepts of mark-up based on cost and mark-up based on selling price
4. Present the concept of break-even analysis
   a. Fixed expenses
   b. Variable expenses
   c. Revenue
5. Present the concept of operating budget
6. Have students prepare a report for a new small business firm in a selected industry
   a. Typical fixed expenses for the firm
   b. Typical variable expenses for the firm
   c. Anticipated demand for the product (see "A" above)
   d. The pricing policy of the firm and the price of the product
   e. Determine what possible changes in pricing would be suggested if demand does not equal anticipated level
   f. What control methods would be necessary to evaluate a successful firm
      1. How often would sales level be reviewed
      2. Who would have primary responsibility
      3. How would measurement be made
7. Have students present information to the class and defend their findings and position

C. COMPARE AND INTERPRET DATA

* See "B" above

D. SHARE / REPORT RELEVANT DATA

* See "B" above

E. TAKE REQUIRED ACTION

* See "B" above

F. FOLLOW-UP AS NECESSARY

* See "B" above

DUTY - TRAIN EMPLOYEES

TASK

A. COMMUNICATE COMPANY IMAGE, POLICIES AND SAFETY PROCEDURES

1. Discuss the need for firms to have missions
   a. Define missions (purpose of the firm)
   b. Have students develop typical missions which companies might adopt
   c. Have students research actual company missions and present to class
2. Present the concept of corporate image
3. Reference students to the Occupational Safety and Health Act (1970)
   a. Purpose
   b. Implications

B. OUTLINE JOB DUTIES

1. Present the concept of job specifications / job analysis (minimum human skills and abilities necessary for a job)
2. Present the concept of job description
   a. What is the purpose of the job
   b. What are the responsibilities
   c. What are the specific duties
   d. List the specific procedures for each duty if a specific order is required
   e. List requirements (or expected results) for each task)
3. Have students write job descriptions in terms of duties for a specific position within a company (i.e. college instructor, secretary, etc.) and compare the student description to an actual job description on file with a local firm or the college
4. Examine student responses for
   a. Completeness
   b. Overlap of duties to another position

C. IDENTIFY SPECIFIC PROCEDURES PER TASK

* See "B" above

D. TEACH SPECIFIC STEPS PER TASK

* See "B" above

E. OBSERVE AND VERIFY COMPREHENSION OF JOB DUTIES

1. Present the idea that managers should verify that employees have received a copy of the duties, responsibilities, and expectations for their job
2. Present the idea that managers should examine employee understanding of job duties and responsibilities by
   a. A paper and pencil test
   b. A conversation with the employee
   c. Observing the employee at the job station
3. Demonstrate how poor communication could result in poor employee performance
   a. Have students (managers) prepare written task descriptions for some selected tasks (i.e. using an electronic typewriter, conducting an interview)
   b. Allow other students (workers)to read the written description and to attempt to perform the written activity without interpretation by the writer
   c. Have student-managers evaluate student-worker performance
      1. Initiate corrective action to change behavior if necessary or
      2. Identify if there are superior alternate methods of performance utilized by the student-workers
      3. Retrain employees if necessary and continue activity
4. The activity should demonstrate to students the
   a. Difficulty in writing effective job descriptions
   b. The ability of employees to misinterpret directives
   c. The ability of people to improve work processes

F. EVALUATE AND CORRECT EMPLOYEE PERFORMANCE

* See "E" above

G. RETRAIN AS NEEDED

* See "E" above

DUTY - DEVELOP EMPLOYEES

TASK

A. ASSESS STRENGTHS AND WEAKNESSES

1. Present the concept of OD (ref. Marchione, A.E. & English, J., "Managing the Unpredictable - A Rational Plan for Coping with Change," Management Review, February, 1982, p. 52-57)
2. Present the concept of performance appraisal (ref. Cederblom, D., "The Performance Appraisal Interview: A review, Implications, and Suggestions," Academy of Management Review, April 1982, p. 219-227)
   a. Assess performance
   b. Compare performance with standards
   c. Develop constructive and / or corrective strategies
3. Examine the necessity of eliminating, as much as possible, the subjective bias associated with performance appraisal
4. Obtain evaluation forms from local business firms and have students evaluate the ability of the form to objectively analyze employee performance

B. IDENTIFY EMPLOYEE OBJECTIVES

1. Present Maslow's Hierarchy of Needs
   a. Physical
   b. Safety
   c. Social
   d. Esteem
   e. Self-actualization
2. Discuss the concept that organizations are oriented toward goals and objectives
3. Discuss the need of individuals to move toward personal objectives
   a. Intrinsic motivators
   b. Extrinsic motivators
4. Present Herzberg's Motivation - Hygiene Model
5. Discuss the need of the organization to coordinate personal objectives with organizational goals

C. OUTLINE PLAN TO STRENGTHEN WEAKNESSES

1. See "B" above
2. Present a strategy for business planning
3. Present Skinner's theory of Behavior Modification
   a. Operant conditioning
   b. Law of Effect
   c. Positive Reinforcement
   d. Negative reinforcement
   e. Shaping
   f. Punishment
   g. Extinction
   h. Reinforcement schedule

   (ref. "At Emory Air Freight: Positive Reinforcement Boosts Performance," Organizational Dynamics, Winter 1973, p. 41-50)

   (ref. "Productivity Gains From a Pat on the Back," Business Week, January 23, 1978, p. 56-62)
4. Have students investigate local businesses and determine within a business examples of weak employee performance, and have students prepare a written plan for possible corrective action and the development of motivational strategies for employees
5. Have students present examples to class and discuss and defend the rationale for their decisions

D. REINFORCE STRENGTHS

* Utilize strategies in "C" above

E. PROVIDE EXPERIENCE IN VARIOUS JOB STRENGTHS

* This is best provided by a sound COOP experience which provides strong objectives for students - job skills job experience and confidence in work are all objectives of the COOP experience

F. DETERMINE MUTUAL OBJECTIVES WITHIN ORGANIZATION

* See "B" above

G. PROVIDE CONTINUAL GUIDANCE

1. See "B" above
2. See "C" above

H. RECOGNIZE / REWARD JOB PERFORMANCE

1. See "B" above
2. See "C" above

DUTY - PLAN LONG RANGE EMPLOYEE SCHEDULE

TASK

A. DETERMINE BASIC STAFF REQUIREMENT

1. Present the concept of organization, emphasize:
   a. Job descriptions
   b. Job analysis
   c. Job specifications
   d. Labor supply
   e. personnel demand
2. Present the concept of human resource planning
3. Present the process of forecasting supply and demand of employees (ref. Scarborough, N., & Zimmer, T.W., "Human Resource Forecasting: Why and Where to Begin," Personnel Administrator, May 1982.
4. Have students determine the staffing needs for a selected firm (i.e. local retail outlet, campus food service) and compare with actual staff (ref. Hoffman, W.H., & Wyatt, L.L., "Human Resources Planning," Personnel Administration, January 1977.)
5. Evaluate student responses and discuss variations among student responses

B. ANTICIPATE CHANGES IN STAFFING NEEDS

1. See "A" above
2. Present the concept of recruiting vs. hiring
3. Present the concept of employee needs assessment
   a. Problems with over-staffing
   b. Problems with under-staffing
   c. Changes in consumer demand in the marketplace
   d. New directions for the firm
   e. Employee turnover
4. Develop a simulated firm and have students propose employee needs, propose what events would precipitate changes in employee needs, and determine the net effect of such changes in terms of demand and supply of human resources
5. Evaluate student responses

C. REVIEW BUDGET

1. Present the concept of operating budget (estimate of overhead, material and labor expenses)
2. Present the concept of total employee cost
   a. Basic wage / salary system (ref. McMillan, J.D., & Williams, V.C., "The Elements of Effective Salary Administration Programs," Personnel Journal, November 1982, p. 832-838)
   b. Employee benefits
   c. Training and development
   d. Other (ref. Foegen, J.H., "Time-off Without Pay: Value Can Exceed Cost," Human Resource Management, Summer 1981, p. 10-12)
3. Present the concept of cost / benefit analysis
4. Create a simulated position within a firm and have students determine the total employee cost
   a. Basic wage / salary
   b. Employee benefits
   c. Training and development
   d. Other

   stress the importance of keeping a qualified labor force
5. Evaluate student responses and discuss how firms might eliminate or reduce some of the expenditures

D. ADJUST STAFF ACCORDINGLY

* See "B" above

DUTY - SERVICE CUSTOMER

TASK

A. IDENTIFY CUSTOMER

1. Present the concept of target market
2. Present the concept of market segmentation
3. Present the two major classifications of goods and services
   a. Industrial goods
      1. Capital items
      2. Expense items
   b. Consumer goods
      1. Specialty goods
      2. Shopping goods
      3. Convenience goods
3. Explain the importance of market research
   a. Primary research
   b. Secondary research
4. Present the concept of need
   a. Identify an existing need
   b. Create a need
5. Have students perform a market survey for a product or service and from this research and other library research determine the need potential for the product or service

B. DETERMINE CUSTOMER NEEDS

* See "A" above

C. PROVIDE GOODS AND SERVICES TO MEED NEEDS

1. See "A" above
2. Present a guest lecturer from the local business community to demonstrate how his/her firm identifies potential clients, determines advertising budgets and media, stimulates and motivates consumers and maintains market position (i.e. banker, real estate broker, insurance agent, retail sales)

D. PROMOTE GOODS AND SERVICES

1. Present the concept of promotion
2. Identify various types of advertising
   a. Newspaper
   b. TV
   c. Radio
   d. Church Bulletin
   e. Yellow pages
   f. Point of purchase
   g. Direct mailing
   h. etc.
3. See "C-2" above

E. PROVIDE CUSTOMER INCENTIVES

1. See "A" above
2. See "C-2" above
3. Initiate a student project where students survey the market, identify the target, develop advertising media and execute the marketing process (students may wish to select their own product or service or the professor may wish to select one for the class)
4. Review projects with students
   a. Was target properly identified
   b. Was market survey adequate
   c. How was a successful project to be measured (control process)
   d. Were results of market survey accurate when compared to actual results
   e. Was the advertising media appropriate for the project and did the advertising message reach the target
   f. General conclusions
   g. Follow-up procedures - what would you alter if the process were repeated - How would the project be more successful

F. USE FOLLOW-UP PROCEDURES

* See "E" above

DUTY - CONDUCT AND REFINE DAILY WORK FLOW

TASK

A. PRIORITIZE ACTIVITIES

1. Present a planning strategy
   a. Determine goal or objective
   b. Prepare a set of alternative strategies
   c. Select most appropriate strategies
      1. Consider time frames
      2. Evaluate economic and/or political limitations
      3. Consider negatives for each solutions
   d. Determine controlling follow-up strategies and time frames, assign duties to proposed company employees
2. Assign students a case which contains a set of company objectives to be achieved
3. Allow students to prioritize these objectives in a manner which they feel would be most effective for the company
4. Review and discuss student case reports and stress the need to have integrated plans so that short-range plans support long-range plans, and both achieve the goals and objectives of the organization - further have students justify their reasons for objective priority

B. DELEGATE RESPONSIBILITIES

1. Present the concept of Line and Staff organization
   a. Line authority
   b. Staff authority
   c. Functional authority
2. Present the concept of delegation and assignment of duties
   a. Authority
   b. Responsibility
   c. Ultimate responsibility
   d. Accountability
   e. Ability of employee to perform delegated duty
3. Administer a delegation level test, test how well you delegate to others (ref. Krein, T.J., "How to Improve Delegation Habits," Management Review, May 1982.)

C. DIRECT AND FOLLOW-UP ON ACTIVITIES

1. Present the concept of Management By Objectives
2. Construct a company for demonstration purposes (i.e. sell pencils to other students in the school, create some unique are work using only loose leaf paper and a ball point pen)
3. Have students assume various positions within the firm (i.e. shift foreman, general manager, working employee)
4. Present general company goals and specific employee goals to be accomplished (i.e. sell a specific quantity of pencils)
5. Have student-managers meet with student-workers and determine if performance goals have been achieved
6. Discuss individual performance with students and discuss the need for direction and follow-up by management

D. IDENTIFY PROBLEMS

1. Present the concept of perception
2. Present critical thinking exercises which allow students to differentiate between truth and assumption based on personal bias
3. Review with students the concept that problem identification is difficult due to our own perceptions and to our own bias, assumptions, and preconceived ideas

E. SOLVE PROBLEMS (PEOPLE, EQUIPMENT, BUSINESS, ETC.)

1. Present a problem solving strategy
   a. Summarize situation
   b. Identify symptoms
   c. Identify problem
   d. Evaluate political/economic constraints
   e. develop a set of solutions
   f. Select the best solution
   g. Determine follow-up procedures
2. Present a case to the class
3. Have students prepare a problem solution strategy utilizing a provided model
4. Discuss students' input to each part of the problem solving strategy
5. Individually critique each students work
   a. Problem identification
   b. Political/economic constraints
   c. Depth and quality of solutions
   d. Considerations of negative consequences of selected solution
   e. Identification and appropriateness of follow-up (control) method

DUTY - PURCHASE FOR COMPANY NEEDS

TASK

A. DETERMINE SPECIFIC QUALITY AND QUANTITY NEEDS

1. Present the concept of Economic Order Quantity (EOC)
   a. Holding costs
   b. Order costs
   c. Safety stock
   d. Reorder time
      1. Rate of demand
      2. Order turn-around time
2. Present the concept of inventory control
   a. Establishment of minimum levels
   b. Perpetual inventory levels
   c. Physical counts
   d. Date and price coding
3. Have students determine EOC for a firm which has one specific product line (i.e. bicycles, lawn mowers, computers)
   a. Have students determine demand for their area
      1. Have students contact local businesses
      2. Instructor may determine need for class
      3. Utilize literature available in library
   b. Have students calculate the EOC
   c. Have students justify their model to the class
4. Evaluate report on the basis of proper use of model and reality of proposal
5. Present the concept of quality - quantity tradeoff
6. Demonstrate the relationship between quality and image
7. Have students identify stores which would handle specific expensive or inexpensive lines of merchandise presented by the instructor as determined by the store image

B. EVALUATE COSTS

1. Present the concept of break even point (BEP)
2. Present the concept of floor-space allocation
3. Demonstrate how a firm might determine the worth of a product or a product line based on its profit or other contribution to the firm (i.e. necessary support product or loss leader or sale item to build customer traffic and how this might affect the
   a. Pricing of that product
   b. Floor allocation
   c. Purchase quantity
4. Present students with a firm which handles a specific number of products (one - three) and supply for students
   a. Product cost information
   b. Square foot selling area
   c. Total fixed costs
   d. Variable costs per item
      1. Item cost
      2. Cost per square foot in different departments of the store
   e. suggested product prices
   f. set product mix
5. Have students determine BEP for the firm with set product mix
6. Have students experiment with other product mixes
7. Evaluate students on concept understanding

3. JUSTIFY EXPENDITURES

* See "B" above

4. COMPLETE TRANSACTION

* May be performed in a coop experience

5. VERIFY RECEIPT OF GOODS

* May be performed in a coop experience

Business Manager
Program

Task/Course Identification

Program

Business Manager

Task/Course Identification

Task/Competency	COM Course Title	Introduction to Business 131	Business Math 131	Computer Science 130	Marketing 131	Career Planning 115	Business Communications 231	Management 231	Business Law 231	Physical Education 111	Accounting 231	Marketing 231	Management 232	Cooperative Education 241	Finance 231	Management 235	Marketing 233	Cooperative Education 242
Evaluate Market	✓			✓							✓			✓	✓	✓		
Put Together a "Game Plan"				✓			✓				✓				✓	✓		
Prepare Budget to Meet Business Objectives	✓			✓						✓	✓			✓	✓	✓		
Set Short Term Goals	✓			✓			✓				✓		✓	✓	✓	✓	✓	✓
Set Long Term Goals	✓			✓			✓						✓	✓	✓			✓
Evaluate Previous Year's Activities				✓							✓			✓	✓	✓		
Visit Work Station	✓						✓						✓		✓			✓
Maintain Open Door Policy							✓								✓			
Listen to Employees and Customers	✓			✓		✓	✓					✓	✓		✓			✓
Read Written Correspondence From Employees and Customers						✓	✓					✓	✓		✓			✓
Keep Confidentiality If Asked	✓						✓					✓	✓		✓			✓
Respond to Input Appropriately							✓					✓			✓			
Share Business Objectives and Results with Employees	✓						✓					✓			✓			
Determine Employees Needs							✓					✓			✓			
Locate Qualified Applicants					✓		✓					✓			✓			
Determine Job Requirements	✓		✓		✓		✓					✓			✓			
Develop and Maintain Adequate Application Form					✓		✓					✓			✓			
Review and Evaluate Completed Application					✓		✓					✓			✓			
Interview Qualified Applicants					✓							✓						
Perform Background Checks												✓						
Screen Applicants as Needed for Job					✓							✓						
Select Employee												✓						
Maintain Paper Trail								✓				✓						
Reject Unselected Applicants												✓						
Determine Reason for Discharge							✓					✓						
Investigate Reason for Discharge							✓					✓						
Document Reason for Discharge							✓					✓						
Evaluate for Consistency of Discipline												✓						
Inform Employee of Action												✓						
Collect Company Property												✓						
Process Final Paperwork												✓						
Read Business and Related Materials	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓			✓
Review Statistical/Financial Report and Analyze Data	✓	✓								✓				✓	✓			
Compare and Interpret Data	✓	✓								✓				✓	✓			
Share/Report Relevant Data			✓			✓				✓				✓				
Take Required Action										✓								
Follow-up as Necessary							✓			✓					✓			
Communicate Company Image, Policies and Safety Procedures	✓						✓						✓		✓			✓
Outline Job Duties					✓		✓					✓	✓		✓			✓
Identify Specific Procedures Per Task			✓				✓					✓	✓					✓
Teach Specific Procedures Per Task			✓				✓					✓	✓		✓			✓
Observe and Verify Comprehension of Job Duties							✓					✓	✓					✓
Evaluate and Correct Employee Performance					✓		✓					✓			✓			✓
Retrain as Needed							✓					✓						✓
Assess Strengths and Weaknesses	✓						✓					✓			✓			
Identify Employees Objectives	✓						✓					✓						
Outline Plan to Strengthen Weaknesses							✓					✓	✓		✓			✓
Reinforce Strengths	✓											✓						
Provide Experience in Various Job Strengths							✓					✓	✓					✓
Determine Mutual Objectives Within Organization					✓		✓					✓	✓		✓			✓

(Over Please)

Program

Business Manager

Task/Course Identification

Task/Competency	COM Course Title	Introduction to Business 131	Business Math 131	Computer Science 130	Marketing 131	Career Planning 115	Business Communications 231	Management 231	Business Law 231	Physical Education 111	Accounting 231	Marketing 231	Management 232	Cooperative Education 241	Finance 231	Management 235	Marketing 233	Cooperative Education 242
Provide Continuous Guidance					✓							✓						
Recognize/Reward Job Performance	✓			✓	✓		✓					✓						
Determine Basic Staff Requirements							✓					✓			✓			
Anticipate Changes in Staffing Needs	✓						✓					✓			✓			
Review Budget							✓			✓				✓	✓			
Adjust Staff Accordingly							✓											
Identify Customer	✓			✓									✓		✓			✓
Determine Customer Needs	✓		✓	✓								✓	✓		✓	✓		✓
Provide Goods and Services to Meet Needs	✓		✓	✓								✓	✓			✓		✓
Promote Goods and Services	✓			✓								✓	✓			✓		✓
Provide Customer Incentives	✓			✓								✓	✓			✓		✓
Use Follow-up Procedures	✓			✓			✓					✓				✓		
Prioritize Activities	✓						✓						✓		✓			✓
Delegate Responsibilities	✓						✓											
Direct and Follow-up on Activities	✓						✓						✓					✓
Identify Problems	✓		✓				✓						✓		✓			✓
Solve Problems (People, Equipment, Business, etc...)	✓						✓					✓	✓	✓	✓			✓
Determine Specific Quality and Needs							✓						✓		✓			✓
Evaluate Costs	✓	✓							✓					✓	✓			
Justify Expenditure	✓								✓					✓	✓			
Complete Transaction	✓													✓				✓
Verify Receipt of Goods	✓													✓				✓

Curriculum Improvement Project

Office Administration Program Profile

Developed by Joyce L. White
with cooperation from area Expert Workers

Prepared by
College of the Mainland

Through a Grant from Coordinating Board
Texas College and University System
PVEP 88-1030-20
Project Director: Dorothy E. McNutt, Ed.D.
Project Coordinator: Maryann Pringle
June 30, 1988

INTRODUCTION

Most educators would agree that the development of curriculum for a college program requires the synthesis of several sources of input. These sources might include: peers, other college programs, advisory committees, practitioners, current texts and other literature and research, a local needs assessment with a view toward the future developments and movements in the industry, etc. The purpose of multiple sources is to avoid a tunnel-vision approach to program development.

The College of the Mainland is currently involved in such an endeavor. We are attempting to reevaluate our office technology curriculum in an effort to attain a program which is exemplary and on the cutting edge of practice and theory. To that end a grant was secured which enabled us to perform one of the elements of the study. The funds were used to complete a DACUM (DACUM is an acronym which stands for developing a curriculum and is researched by The Ohio State University) process for the program. The result of that endeavor is contained in this booklet.

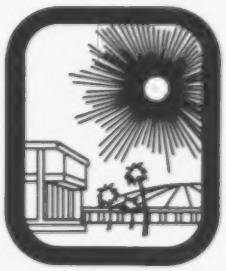
The process utilized office personnel from the communities in the College of the Mainland district. These 14 office managers, executive secretaries, and administrative assistants participated in a two-day workshop directed by two DACUM facilitators. When given the job title and job description that we had chosen, "office systems specialist," the panel could not accept either one. The one title that was agreed to by all was "office administrator" which they felt more accurately defined their jobs. The term "specialist" was too narrow in the scope of their employment. The job description is listed with the profile.

Through the panel's consensus, 17 specific duties which they performed were identified. These duties were subdivided into tasks and prioritized. The duties and tasks were then verified via a job/task analysis by 20 professional secretaries in the district. They ranked each task as to the level of importance in their job. The tasks that received a less than 3.0 rating (out of 4) should receive less emphasis in the curriculum.

The curriculum which follows was developed from the various steps to performing each of the tasks. For each task, standards, materials and supplies, required prerequisite knowledge, and attitudes were researched and presented. Keeping in mind that there are many various teaching strategies, the following curriculum outline is a basis for developing lesson plans and performance objectives. The required knowledge can be considered the enabling objectives and in most cases, the standards are actual evaluation items. An instructor would need to have these tasks verified by office administrators **in their locale** in order to make sure that the high-priority items are indeed taught in their programs.

Joyce L. White, CPS

OFFICE ADMINISTRATOR
DACUM CHART



College of the Mainland
Division of Business
March 18, 1988

Office Administrator

OFFICE ADMINISTRATOR JOB DESCRIPTION-Able to set up and maintain all systems of office, such as mailing, office callers, making appointments, word processing, communication skills, and record management. Must have keyboarding skills, oral and written communication skills, computational skills, and human relation skills.

DUTIES	Task Statements								
A Review Calendars	Sychronize Calendars (see boss) A0	Update/Rearrange Calendar A1	Review Daily Schedule With Manager A3	Keep Action File A4					
B Process Mail	Sort, Categorize, and Prioritize B0	Review for Actions and Meetings B1	Attach Back-Up Notes B3	Stamp Date Received B4	Note Necessary Follow-Up/ Due Dates B5	Route Mail B6	Prepare Special Mailings(Fed Express/ Certified/Bulk/etc. B7	Document Ongoing Correspondence B8	Follow-Up on Action Correspondence B9
C Plan To Organize Work Tasks	Review Deadlines & Establish Time Frames C0	Gather Information C2	Prioritize Work C3	Implement/Delegate Work Tasks C4	Follow-Up on Delegated Work Tasks C5				
D Respond To/Screen Calls and People	Identify Need of Caller D0	Critique and Follow-Up on Request D2	Relay Messages D3	Project Professional Image/ Provide Hospitable Atmosphere D4					
E Interpret Policies and Procedures	Study/Stay Abreast of Company Regulations E0	Research/Clarify/ Communicate Policies & Procedures E2							
F Orient and Train Employees/Employers	Establish/ Communicate Job Standards & Expectations F0	Interpret Policies & Procedures to New Employees/Employers F2	Provide Documentation for Orientation of New Employees F3	Establish Job Performance Plan F4	Act As Role Model F5				
G Develop and Maintain Office Procedures	Identify Need & Desired Results G0	Establish Procedures G2	Write Procedures G3	Compile Office Procedures Manual G4	Update Manual, Communicate Changes G5				
H Evaluate Subordinates For Performance	Provide Ongoing Feedback H0	Comply With Company Policies & Guidelines H2	Schedule Performance & Appraisal Interview H3	Conduct Interview H4	Document Performance Evaluation H5				
I Recruit/Interview and Hire Personnel As Appropriate	Identify Job Requirements I0	Submit Paperwork for Position Approval I2	Post/Advertise Job Openings I3	Review Applications I4	Interview Applicants I5	Obtain Background/ Medical Clearances on Selected Applicants I6	Make Selection & Offer Position I7	Notify Unselected Applicants I8	Complete/Submit Final Personnel Paperwork I9
J Purchase and Maintain Office Supplies and Equipment	Identify and Justify Need J0	Identify Source and Cost J2	Obtain Approvals J3	Process and Follow-Up on Order J4	Inventory Items J5	Train Users J6			
K Develop and Maintain Personnel Payroll Records	Set Up Individual Personnel Records K0	Collect Employee Data K2	Implement Personnel Policy/ Procedures/ Regulations K3	Maintain Personnel File Continuously K4	Process Payroll K5	Disburse Payroll K6	Follow-Up & Verify All Records K7		
L Assist With Departmental Financial Planning	Review Previous Year's Budget L0	Project/Prioritize Current Needs L2	Justify/Document Needs L3	Establish Budget L4	Make Presentation to Management L5	Obtain Approval L6	Rework Budget, As Needed L7	Monitor Rates of Expenditures L8	Take Necessary Action L9
M Coordinate/Support Company Involvement In Internal/External Projects	Identify Responsibility in Project M0	Attend Organizational Meetings M2	Research/ Communicate Related Information M3	Set Up Meetings as Appropriate M4	Recruit/Support as Appropriate M5	Do Necessary Follow-Up and Maintain Records M6	Publicize Project M7	Collect/Disburse/ Report Donations M8	Document Outcomes & Make Final Report M9
N Handle Travel Arrangements	Set Up Trip Folder N0	Obtain Necessary Approvals N2	Identify Travel Schedule (Date/Time/ Location) N3	Review and Critique Travel Requirements N4	Make Reservations N5	Prepare Paperwork N6	Confirm Arrangements N7	Prepare Trip Itinerary N8	Obtain Travel Documents N9
	Arrange Management Coverage N10	Prepare Expense Report Following Company Policy/ Procedure N11	Reconcile Travel Funds N12	Prepare Follow Up Documentation, Correspondence, & Reports N13					
O Set Up and Maintain Office Filing Systems	Review & Follow Company Records Management Policy O0	Identify Needed Files/System O2	Order Needed Materials/ Equipment O3	Organize Needed Information & File System O4	Prepare File Index O5	Train Users O6	Maintain & Update Files O7	Prepare for File Audits O8	
P Arrange Meetings	Identify Participants P0	Coordinate Calendars of Participants P2	Determine Date and Time P3	Arrange for Meeting Site P4	Confirm Meeting in Writing/Request Participant Needs P5	Make Necessary Travel/Meeting Room & Participant Arrangements P6	Complete Necessary Paperwork & Documentation P7	Reconfirm All Arrangements P8	Prepare Related Meeting Resources P9
	Complete Follow-Up Requirements (Letters,Certificates, Bills) P10								
Q Prepare Written Communication	Gather/Record Information Q0	Draft Written Material Q2	Critique/Edit Written Materials Q3	Obtain Signature/ Approvals Q4	Distribute Information Q5	Document Action Q6			

KNOWLEDGE/SKILL

Who, What, When, Where, and How of Company
Shorthand
Dictation
Oral and Written Communication
People Interaction
Problem Solving
Decision Making
Goal Setting
Business, General Etiquette
Telephone
Time Management
Listening
Personnel Management
Team Building
Basic Accounting
Operation of Office Equipment as Appropriate

SOFTWARE

Display Write (III and IV)
Calendar Software
Report - PAK
Symphony
LOTUS
INFO
WangRite
Chart Master
D-Base IV
WordStar 2000 and 2000+
Word Perfect
Text Pak

ATTITUDES/TRAITS

Handle Confidentiality
Self-Starter
Assertive (not aggressive)
Flexible (willing to change)
Willingness to Train as Backup for Other Positions
Good-Judgement
Open-Minded
Courteous
Diplomacy (smile)
Professional Image
Humor
Honesty
Patience
Manage Stress (keep cool)
Keep Personal Life Out of Office
Attention to Details
Mutual Support
Positive Attitude
Sense of Accomplishment
Loyalty
Career vs. Job
Handle Pressure/Deadlines
Sense of Responsibility
Pride
Committed to Job
Dependable

OFFICE EQUIPMENT/TOOLS

PC's
Copier
Typewriter
Calculator (10-key by touch)
Telephone System (Beeper/Remote/Recorder/2-way Radio)
Modem
Shredder
Filing System
Dictaphone
Printer
FAX
A-V Equipment (standard for group meeting arrangements)
Plotters
Postage Meters
Labelers

CHANGES IN FUTURE (3-5 YEARS)

At Least Two Years College
More Management of Organization Through Technology
Computer Used for Forms/Routine Correspondence
Constant Continuing of Education
More of a Management Role
More AutomationTasks
More Retraining
Fewer People
Secretary is Catalyst for Change/Needs
(new equipment/applications start here)
Manage Transitions
Maintain Simultaneous Systems During Changes
More Electronic Filing
Better Physical Setting

OFFICE ADMINISTRATOR PANEL MEMBERS

Cecelia Kusek - Hitchcock Independent School District
Carolyn Crawford - La Marque Independent School District
Jerry Simpson - Sterling Company
Maxie Dillon - Sterling Company
Sue Lessa - Sterling Company
Susan Feltner - Danforth Hospital
Mary Nell Kunkel - U.S. Army Corps of Engineers
Maryann Patlan - U.S. Army Corps of Engineers
Michelle D. Salazar - University of Texas Medical Branch
Diana Rasmussen - Solar Foam Insulation, Inc.
Kathy Basa - Rockwell Shuttle Operations Company
Cheryl Moore - Rockwell Shuttle Operations Company
Jo Ann Walgamuth - NASA/Johnson Space Center
La Dona Landry - University of Texas Medical Branch

FACILITATORS

Dr. Mary Brumbach
Linda Lee

OFFICE ADMINISTRATORS

CATEGORY A: REVIEW CALENDARS

I. Synchronize Calendars

- **A. Steps**
  1. Check supervisor's monthly calendar
  2. Compare with your calendar
  3. Record all appointments on your calendar when reporting to more than one principal.
- **B. Standards**
  1. 100% accuracy
- **C. Materials and Supplies**
  1. Two similar calendars
  2. Calendaring software
  3. Computer
- **D. Required Knowledge**
  1. Attention to detail
  2. Computer usage
  3. Keyboarding
- **E. Attitudes**
  1. Trust
  2. Cooperation

II. Update/Rearrange Calendar

- **A. Steps**
  1. Match commitments so days' events are the same
  2. Adjust whichever calendar needs updating
  3. Take calls about changes or confirmations.
- **B. Standards**
  1. Writing neatly
  2. Keyboard a simulation with 100% accuracy
- **C. Materials/Supplies**
  1. Log book
  2. Computer software
- **D. Required Knowledge**
  1. Know format of monthly calendar, log books, etc.
- **E. Attitudes**
  1. Dependable
  2. Sense of responsibility

III. Review Daily Schedule With Manager

- **A. Steps**
  1. Explain calls for revision.
  2. Seek new information regarding unknown revisions.
- **B. Standards**
  1. Role-playing
  2. Subjective evaluation
- **C. Materials and Supplies**
  1. Rolodex of phone numbers/contacts and/or data base

D. **Required Knowledge**
   1. Oral and written communication.
   2. Proper phone usage/etiquette.

E. **Attitudes**
   1. Good judgement
   2. Flexible

IV. Keep Action File

A. **Steps**
   1. Compile a record of meetings, appointments if necessary (may be log book).
   2. Schedule new appointments/revisions.

B. **Standards**
   1. Role-playing using phone system

C. **Materials and Supplies**
   1. Log/Appointment Book
   2. Telephone system
   3. Electronic system

D. **Required Knowledge**
   1. Written communication
   2. Computer input
   3. Business English

E. **Attitudes**
   1. Efficiency
   2. Follow through on details

CATEGORY B: PROCESS MAIL

I. Sort, Categorize And Prioritize

A. **Steps**
   1. Open all first class mail except those marked personal or confidential.
   2. Sort by classes mail into four categories.
   3. Sign for special delivery mail.
   4. Inspect for enclosures, stamp the date received.
   5. If enclosure is missing, notify the sender.
   6. Follow system for electronic mail messages.

B. **Standards**
   1. Total accuracy on an objective test.

C. **Materials and Supplies**
   1. Mail opener
   2. Date stamp
   3. Pencils
   4. Stapler
   5. Tape
   6. Paper clips
   7. Mail expected or To-do list
   8. Computer

D. **Required Knowledge**
   1. Classes of domestic mail (1st, 2nd, 3rd, 4th class mail.
   2. Oral and written communication

3. Decision making
4. E-mail
5. Know others in company with related jobs
6. Study organizational chart

E. **Attitudes**
1. Confidentiality
2. Efficiency

II. **Review for Actions and Meetings**

A. **Steps**
1. Note or red-line specifics in correspondence (who, what, where, when)
2. Identify meetings and note on calendar. Input into master schedule on computer, when directed.
3. Annotate if appropriate
4. Attach back-up notes
5. Record any money received

B. **Standards**
1. Total accuracy on a role-playing or simulation project.

C. **Materials and Supplies**
1. Sample letters
2. Computer
3. Computer software

D. **Required Knowledge**
1. Records management
2. Computer input
3. Written communication

E. **Attitudes**
1. Confidentiality
2. Efficiency

III. **Attach Back-up Notes:** See step II "Review for Actions and Meetings," A "Steps," #4 above.

IV. **Stamp Date Received:** See step I "Sort, Categorize, and Prioritize," A "Steps," #4 above.

V. **Note Necessary Follow-Up Due Dates:** See step II "Review for Actions and Meetings," A "Steps," #2 above and step VI "Route Mail," A "Steps," #3 and #4 below.

VI. **Route Mail**

A. **Steps**
1. Keep a daily mail record of routed mail.
2. Note to whom sent.
3. Note action to be taken and follow-up.

4. Record date of follow-up.
5. Re-route mail that does not belong in your department.
6. Forward mail using action requested slip, circulation, or routing slips.
7. Write names of to whom sent if copies are to be distributed.

B. Standards
1. Total accuracy on objective cases or simulation exercises.

C. Materials and Supplies
1. Variety of Circulation Forms

D. Required Knowledge
1. Organizational structures
2. Decision making

E. Attitudes
1. Confidentiality
2. Efficiency

VII. Prepare Special Mailings (Federal Express, Certified, Bulk)

A. Steps
1. Determine when item must arrive.
2. Determine cost effectiveness of service.
3. Choose special service required.
4. Determine public or private delivery service.
5. Communicate with mailroom staff if available.
6. Wrap package in appropriate manner.
7. Electronic mail is printed/sent on.

B. Standards
1. Total accuracy

C. Materials and Supplies
1. Sample cases
2. Mailing supplies (envelopes, boxes, etc.)
3. Computer
4. Computer software

D. Required Knowledge
1. Various special service mailing systems.
2. Time zones
3. Correct address placement
4. Automated equipment
5. Zip code manuals
6. Fax-Zapp
7. Domestic/International mail cost analysis
8. Communications and computational skills

E. Attitudes
1. Self-starter
2. Attention to detail
3. Good judgement
4. Confidentiality

VIII. **Document Ongoing Correspondence**

A. **Steps**
1. Maintain files of actions done or to be done.
2. Follow up on expected results/actions.
3. Keep tickler file of important actions to be done.

B. **Standards**
1. Total accuracy, 90% accuracy about a case situation.

C. **Materials and Supplies**
1. Practice set
2. Sample files of correspondence
3. Tickler file

D. **Required Knowledge**
1. Records management
2. Good human relations

E. **Attitudes**
1. Committed to job
2. Assertive

IX. **Follow-Up on Action Correspondence:** See step VI "Route Mail," A "Steps," #4 above.

CATEGORY C: PLAN TO ORGANIZE WORK TASKS

I. **Review Deadlines and Establish Time Frames**

A. **Steps**
1. Analyze work done.
2. Prioritize according to date due.
3. Note any "urgent" or "rush" tasks.
4. Plan a routine allowing some flexibility.
5. Use time wisely.

B. **Standards**
1. Able to maintain efficient work flow so that all time constraints are met.
2. 90% accuracy on simulation or in-basket project

C. **Materials and Supplies**
1. Simulation
2. In-basket project

D. **Required Knowledge**
1. Oral and written communication.
2. Learn the cycle of the office system.
3. Know goals of business.
4. Manage stress
5. People interaction
6. Time management
7. Learn company goals
8. Problem solving

E. **Attitudes**
1. Self-starter
2. Good judgement
3. Decision making
4. Commitment to job

5. Team work
6. Handle pressure/deadlines

II. **Gather Information**

A. **Steps**
1. Determine what needs to be done.
2. Read instructions.
3. Research further information, if necessary.
4. Collect and verify facts needed to assist principal.
5. Note whether proper supplies are available.
6. Assemble materials required.

B. **Standards**
1. Able to maintain efficient workflow so that all time constraints are met.
2. 90% accuracy on simulation or in-basket project

C. **Materials and Supplies**
1. Simulation
2. In-basket project

D. **Required Knowledge**
1. Oral and written communication
2. Learn the cycle of office systems
3. Know goals of business
4. Manage stress
5. People interaction
6. Time management
7. Learn company goals
8. Problem solving

E. **Attitudes**
1. Self-starter
2. Good judgement
3. Decision making
4. Commitment to job
5. Team worker
6. Handle pressure
7. Deadlines

III. **Prioritize Work**

A. **Steps**
1. Make a daily plan.
2. Arrange to meet deadlines.
3. Try to decrease interruptions or schedule them.
4. Tackle difficult jobs early.
5. Save easy jobs for late in the day.

B. **Standards**
1. Able to maintain efficient workflow so that all time constraints are met.
2. 90% accuracy--demonstrate on a simulation exercise

C. **Materials and Supplies**
1. Simulation
2. In-basket project

D. **Required Knowledge**
   1. Oral and written communication
   2. Learn the cycle of the office system
   3. Know goals of business
   4. Manage stress
   5. People interaction
   6. Time management
   7. Learn company goals

E. **Attitudes**
   1. Self-starter
   2. Good judgement
   3. Decision making
   4. Commitment to job
   5. Team work
   6. Handle pressure/deadlines

IV. **Implement/Develop Work Tasks**

A. **Steps**
   1. Group similar tasks.
   2. Plan to do job correctly the first time.
   3. Try to complete task once begun.
   4. Delegate tasks as appropriate.
   5. Give adequate instructions to assistants.
   6. Keep tools/supplies within easy reach.

B. **Standards**
   1. Able to maintain efficient workflow so that all time constraints are met.
   2. 90% accuracy on a simulation exercise

C. **Materials and Supplies**
   1. Simulation
   2. In-basket project

D. **Required Knowledge**
   1. Oral and written communication
   2. Learn the cycle of the office system
   3. Know goals of the business
   4. Manage stress
   5. People interaction
   6. Time management
   7. Learn company goals

E. **Attitudes**
   1. Self-starter
   2. Good judgement
   3. Decision making
   4. Commitment to job
   5. Team work
   6. Handle pressure/deadlines

V. **Follow-Up on Delegated Work Tasks**

A. **Steps**
   1. Manage details.
   2. Keep a "To Do List."
   3. Check on items to be returned to you.

4. Keep a "Tickler" file.
5. Keep a "Reading" file.

B. Standards

1. Able to maintain efficient workflow so that all time constraints are met.
2. 90% accuracy on a simulation exercise

C. Materials and Supplies

1. Simulation
2. In-basket project

D. Required Knowledge

1. Oral and written communication
2. Learn the cycle of the office system
3. Know goals of the business
4. Manage stress
5. People interaction
6. Time management
7. Learn company goals

E. Attitudes

1. Self-starter
2. Good judgement
3. Decision making
4. Commitment to job
5. Team work
6. Handle pressure/deadlines

CATEGORY D: RESPOND TO/SCREEN CALLS AND PEOPLE

I. Identify Need of Caller

A. Steps

1. Answer phone or greet visitor promptly.
2. Identify yourself.
3. Listen to request.
4. Respond to request or direct caller to appropriate person.
5. Set appointments for appropriate callers/guests.

B. Standards

1. Maintain goodwill of public
2. Answer objective questions within 98% accuracy

C. Materials and Supplies

1. Simulation
2. Telephone demonstration/practice
3. Message blanks

D. Required Knowledge

1. Oral and written communication
2. Know good human relations skills
3. Shorthand
4. Telephone etiquette
5. Good listening
6. Telephone systems and services

E. Attitudes

1. Assertive
2. Pleasant
3. Attention to details

4. Loyalty
5. Mutual support
6. Sense of responsibility
7. Patience

II. **Critique and Follow-Up on Request**

A. **Steps**
1. If caller was transferred (or not answered) determine action.
2. Check line if caller is holding.
3. Place calls.

B. **Standards**--See I. B. above
C. **Materials and Supplies**--See I. C. above
D. **Required Knowledge**--See I. D. above
E. **Attitudes**--See I.(Identify Need of Caller) E.(Attitudes)

III. **Relay Messages**

A. **Steps**
1. Write legible message with all pertinent information.
2. Ask questions and listen carefully. (Probe courteously.)
3. Place message in appropriate place promptly.

B. **Standards**--See I. B. above
C. **Materials and Supplies**--See I. C. above
D. **Required Knowledge**--See I. D. above
E. **Attitudes**--See I. E. above

IV. **Project Professional Image/Provide Hospitable Atmosphere**

A. **Steps**
1. Greet callers (phone and in-person) with pleasant voice.
2. Handle persons with tact and dignity.
3. Make guest comfortable by directing them to a seating area.
4. Follow preference of principal in directing visitors/clients.

B. **Standards**--See I. B. above
C. **Materials and Supplies**--See I. C. above
D. **Required Knowledge**--See I. D. above
E. **Attitudes**
1. Diplomacy
2. Pride
3. Loyalty
4. Positive attitude
5. Good judgement

CATEGORY E: INTERPRET POLICIES AND PROCEDURES

I. Study/Stay Abreast of Company Regulations

A. Steps

1. Know procedural steps by processing work orders in the office systems.
2. Read organizational guide and learn policy of specific topics.
3. Learn goals of organization. (Long and short-range plans)
4. Know other systems and sub-systems of organization.

B. Standards

1. 90% accuracy on objective questions

C. Materials and Supplies

1. Examples of Office Systems Manuals from various companies
2. Case studies of current problems in offices
3. Samples of company goals, long-range plans
4. Films, video cassettes

D. Required Knowledge

1. Flow charts of systems in office
2. Written and Oral Communication
3. Types of business
4. Economic consideration

E. Attitudes

1. Loyalty
2. Team building
3. Assertive

II. Research/Clarify/Communicate Policies and Procedures

A. Steps

1. Acquire, analyze, and disseminate information.
2. Inform new employees in office of company policies/procedures. The office is an information processing system. Each output is an input into some other facet of the system.

B. Standards

1. 90% accuracy on case situations
2. Written essays

C. Materials and Supplies

1. Case studies

D. Required Knowledge

1. Problem solving

E. Attitudes--See I. E. above

CATEGORY F: ORIENT AND TRAIN EMPLOYEES/EMPLOYERS

I. Establish/Communicate Job Standards and Expectations

A. **Steps**
   1. Explain scope and limits of job to subordinates.
   2. Conduct on-the-job orientation training.
   3. Introduce new employees to work place and work group.
   4. Demonstrate equipment to be used.
   5. Inform employees of formal on-the-job training programs.

B. **Standards**
   1. Objective tests
   2. Role playing demonstrations

C. **Materials and Supplies**
   1. Films
   2. Video cassettes

D. **Required Knowledge**
   1. Oral Communication
   2. Team building
   3. People interaction
   4. Personnel Management
   5. Office equipment usage

E. **Attitudes**
   1. Positive
   2. Professional Image
   3. Mutual support

II. Interpret Policies and Procedures to New Employees/Employers

A. **Steps**
   1. Explain company policies (rules and regulations) to subordinates.
   2. Explain specific systems/procedures to new principals.

B. **Standards**--See I. B., #1

C. **Materials and Supplies**
   1. Sample Policy Manuals
   2. Office Systems Manuals

D. **Required Knowledge**
   1. Oral communication
   2. Company regulations

E. **Attitudes**
   1. Diplomacy
   2. Committed to job

III. **Provide Documentation For Orientation of New Employees**

A. **Steps**
1. Keep record of purpose of each session with new employee.
2. Keep record of material given, i.e., safety manual, organization policy manual, standard operation procedures for equipment, etc.

B. **Standards**
1. Role play a simulation exercise.
2. 90% subjective evaluation.

C. **Materials and Supplies**
1. Script/simulation
2. Films/videos

D. **Required Knowledge**
1. Records management
2. Oral communications
3. Business Law

E. **Attitudes**
1. Loyalty to company
2. Mutual support

IV. **Establish Job Performance Plan**

A. **Steps**
1. Research company policy regarding systematic employee evaluation.
2. Inform employee of the policy upon hiring.
3. Describe the established performance standards and how they will be measured.

B. **Standards**--See I. B. above.

C. **Materials and Supplies**
1. Sample employee rating/evaluation forms.

D. **Required Knowledge**--See II. D. above and II. I. below

E. **Attitudes**
1. Assertive
2. Mutual support.

V. **Act as a Role Model**

A. **Steps**
1. Demonstrate your commitment to your career by working within scope of authority.
2. Perform as you want subordinates to perform.
3. Demonstrate a positive outlook to your job.
4. Conduct yourself as a professional.
5. Use good business ethics.

B. **Standards**
1. Prepare a personal career growth plan.
2. 90% subjective evaluation.

C. **Materials and Supplies**
1. Guest speaker or counselor.

D. **Required Knowledge**
   1. Human relation skills
   2. Business Psychology

E. **Attitudes**
   1. Career vs. Job
   2. Keep personal life out of office
   3. Positive attitude
   4. Professional attitude

CATEGORY G: DEVELOP AND MAINTAIN OFFICE PROCEDURES

I. Identify Need and Desired Results

A. **Steps**
   1. Plan the system.
   2. Consider whole organization, i.e., define major systems of the office.
   3. Identify major components of each system--input, output and boundaries.
   4. Determine relative importance of each system. (mail, communications, record keeping, accounting, purchasing, etc.)

B. **Standards**
   1. When given a topic, write sample proposal for a change of procedure or explain one complete office system.

C. **Materials and Supplies**
   1. Case studies
   2. In-basket
   3. Simulations

D. **Required Knowledge**
   1. Oral and written communication
   2. Decision making
   3. Problem solving
   4. Logistical flow of ideas
   5. Basic systems concepts

E. **Attitudes**
   1. Flexible
   2. Team work
   3. Good judgment
   4. Attention to detail
   5. Assertive
   6. Diplomacy
   7. Committed to job

II. Establish Procedures

A. **Steps**
   1. Analyze systems/sub-systems (Why is a particular operation necessary? Who? What? When? Where? How quickly? Correctly?)
   2. Define specific techniques for each process.

B. **Standards**
   1. 90% on objective tests

C. **Materials and Supplies**--See I. C. above
D. **Required Knowledge**--See I. D. above
E. **Attitudes**--See I. E. above

III. **Write Procedures**

A. **Steps**
1. Design bases on system analysis (or re-design)
2. Solicit support of users of specific needs.
3. Document flow of design.
4. Document the procedures.

B. **Standards**
1. 90% accuracy when writing a workflow design and show graphically via charts.
2. Write procedures

C. **Materials and Supplies**
1. See I. C. above
2. Computer software
3. Computer

D. **Required Knowledge**
1. See I. D. above
2. Word processing
3. Flow charting
4. English usage skills

E. **Attitudes**
1. Mutual support
2. Sense of responsibility

IV. **Compile Office Procedures Manual**

A. **Steps**
1. Gather system design documentation.
2. Sequence procedures.
3. Arrange Office Systems Manual

B. **Standards**
1. Working in small groups, compile and produce an Office Systems Manual

C. **Materials and Supplies**
1. COmputer
2. Software
3. Typewriter
4. See I. C. above

D. **Required Knowledge**--See III. D. above

E. **Attitudes**
1. Mutual support
2. Attention to detail
3. Good judgement

V. **Update Manual, Communicate Changes**

A. **Steps**
1. Explain changes to all employees.
2. Describe purposes and advantages of changes (how system fits organization.)

3. Explain the impact on jobs, if new training is required.
4. Communicate--emphasizing the human factor in the operation of successful systems.
5. After implementation, continue to control systems efficiency.

B. Standards

1. Write memo explaining a proposed change of a procedure with 95% accuracy. Include all components in steps 1, 2, and 3 above.

C. Materials and Supplies

1. Case study
2. Computer
3. Software

D. Required Knowledge

1. Human relations
2. Oral and written communication

E. Attitudes

1. Manage stress
2. Positive attitude
3. Patience
4. Committed to job

CATEGORY H: EVALUATE SUBORDINATES PERFORMANCE

I. Provide Ongoing Feedback

A. Steps

1. Give informed feedback to employee in a timely manner.
2. Insure that employee knows how they will be measured.

B. Standards

1. Role playing interview with subjective critique.
2. 90% accuracy

C. Materials and Supplies

1. Cases
2. Personnel Manuals

D. Required Knowledge

1. Oral Communication
2. People Interaction
3. Personnel Management
4. Team Building
5. Interview Techniques
6. Goal Setting

E. Attitudes

1. Assertive
2. Courteous/Kind
3. Good Judgement
4. Sense of Responsibility
5. Diplomacy
6. Mutual Support

II. **Comply With Company Policies and Guidelines**

A. **Steps**
1. Follow specified organizational plan for appraisals.
2. Devise a systematic plan for evaluation.
3. Use same standards for persons doing same job.
4. Appropriate appraisal instruments are used.

B. **Standards**
1. Visit a company manager and solicit information about their appraisal system.
2. Write a report discussing the purposes of performance appraisal at the company.
3. Obtain example performance appraisal forms.
4. 90% subjective evaluation.

C. **Materials and Supplies**
1. Organization policies manual
2. Case studies
3. Variety of appraisal forms
4. Transparencies of sample evaluation plans

D. **Required Knowledge**
1. Human resource management
2. Team building

E. **Attitudes**
1. Assertive
2. Good judgement

III. **Schedule Performance and Appraisal Interview**

A. **Steps**
1. Insure employee's knowledge of interview.
2. Determine if replacement is needed during interview.
3. Schedule sufficient time for interview.
4. Select an appropriate meeting place.
5. Plan the interview--goals, items to be discussed, strengths, weaknesses, plan for growth, etc.

B. **Standards**
1. Write an essay stating the components of appraisal systems and 3-4 problems of performance appraisals.
2. 90% subjective evaluation

C. **Materials**
1. Video presentation
2. Transparencies
3. Handouts of six different problems

D. **Required Knowledge**
1. Goals setting
2. Oral communication
3. Time management

E. **Attitudes**
1. Self-motivated
2. Sense of responsibility
3. Committed to job

IV. **Conduct Interview**

A. **Steps**
1. Begin with general conversation to relax.
2. Discuss each aspect of job performance, strengths first; weaknesses second.
3. Provide constructive criticism.
4. Point the ways weaknesses can be overcome.
5. Discuss job enrichment/determine further training needs.
6. Solicit employee suggestions and complaints.

B. **Standards**
1. Role-playing an interview
2. 90% objective evaluation

C. **Materials and Supplies**
1. Scripts for role playing
2. Sample case studies

D. **Required Knowledge**
1. Interviewing techniques
2. Oral communication
3. Legislative actions
4. Records management
5. Business law

E. **Attitudes**
1. Diplomacy
2. Humor
3. Mutual support
4. Courteous

V. **Document Performance Evaluation**

A. **Steps**
1. Summarize important points.
2. Give employee the written evaluation to read.
3. Ask them to sign the evaluation.
4. If employee refuses to sign, have a representative witness the refusal.

B. **Standards**
1. Write a plan for an appraisal interview with an employee who is performing unsatisfactorily.

C. **Materials and Supplies**
1. Case studies

D. **Required Knowledge**
1. Personnel management
2. Decision making
3. Written communication
4. Records management

E. **Attitudes**
1. Maintains confidentiality
2. Honest
3. Mutual support
4. Good judgement

CATEGORY I: RECRUIT/INTERVIEW AND HIRE PERSONNEL AS APPROPRIATE

I. Identify Job Requirements

A. Steps
1. Consult the staffing system policy.
2. Determine which system needs additional human resources.
3. Inform management of additional labor needs.

B. Standards
1. Essay tests
2. Explain the advantages and disadvantages of various selection procedures
3. 95% accuracy

C. Materials and Supplies
1. Examples of flow charts of hiring process
2. Films, videos
3. Transparencies of recruiting office employees using internal and external sources

D. Required Knowledge
1. Oral Communication--Legal considerations in staffing
2. Personnel Management
3. Decision Making
4. Business law

E. Attitudes
1. Handle Confidentiality
2. Open-minded
3. Committed to Job

II. Submit Paperwork for Position Approval

A. Steps
1. Prepare requisition for additional labor needs.
2. Justify reason as to demand, economic changes, attrition, etc.
3. Receive written approval.

B. Standards
1. Describe the problems and benefits of government regulation of personnel resources.
2. Three page report, 90% subjective evaluation

C. Materials and Supplies
1. Case studies
2. Handouts of various laws

D. Required Knowledge
1. Micro economics
2. Cost analysis
3. Written communication

E. Attitudes
1. Assertive
2. Sense of responsibility

III. **Post/Advertise Job Openings**

A. **Steps**
1. Prepare job opening announcement.
2. Follow staffing system policy regarding advertisement--testing, application, reference checks, etc.
3. Notify appropriate offices/agencies.
4. Allow sufficient time for interested persons.

B. **Standards**
1. Write an effective recruitment and selection program stating markets and methods
2. 90% subjective evaluation
3. Write a job opening announcement for publication in the newspaper.

C. **Materials and Supplies**
1. Sample application and job description forms
2. Handouts of unlawful inquiries
3. Types of tests
4. Transparencies of various marketing agencies

D. **Required Knowledge**
1. Business law
2. Marketing
3. Written communication

E. **Attitudes**
1. Committed to job
2. Open minded

IV. **Review Applications**

A. **Steps**
1. Accumulate all applications which meet job requirements.
2. Select several persons to be interviewed based on test data and job related criteria.

B. **Standards**
1. Library study of three court cases on employment
2. Write 5-page report

C. **Materials and Supplies**
1. Sample applications
2. Handouts of employment legislation
3. Case studies

D. **Required Knowledge**
1. Library research skills
2. Business law
3. Written communication
4. Records management

E. **Attitudes**
1. Handles confidentiality
2. Commitment
3. Records management
4. Good judgement

V. **Interview Applicants**

A. **Steps**
1. Establish specific goals for the interview.
2. Schedule the interview.
3. Question applicants according to goals of the interview.
4. Dismiss applicant telling them how process will be completed.

B. **Standards**
1. Conduct three interviews
2. Use variety of four neutral and four leading questions
3. 90% objective evaluation

C. **Materials and Supplies**
1. Case studies
2. Videos or films

D. **Required Knowledge**
1. Interview techniques
2. Oral communication

E. **Attitudes**
1. Diplomacy
2. Sensitive
3. Leadership

VI. **Obtain Background/Medical Clearance on Selected Applicants**

A. **Steps**
1. Call references on selective candidates.
2. Secure medical/background information.
3. Document all communications.

B. **Standards**--See IV. B. above
C. **Materials and Supplies**--See IV. C. above
D. **Required Knowledge**--See IV. D. above
E. **Attitudes**--See IV. E. above

VII. **Make Selection and Offer Position**

A. **Steps**
1. Collect all data pertaining to staffing data.
2. Organize data in order to expedite process.
3. Contact any other persons with authority to recommend candidate.
4. Contact selected applicant--make offer.
5. Explain terms of employment and deadline for acceptance.

B. **Standards**--See V. B. above
C. **Materials and Supplies**--See IV. C. above
D. **Required Knowledge**--See IV. D. above
E. **Attitudes**--See IV. E. above

VIII. Notify Unselected Applicants

A. Steps
1. Explain tactfully and truthfully when rejecting candidates.
2. Maintain confidential information and company's goodwill.

B. Standards
1. Write for a copy of your states' fair employment practices legislation.

C. Materials and Supplies
1. Address of State Employment Office
2. Case studies

D. Required Knowledge--See VII. D. above
1. Copy of W-4 form.
2. Transparency of list of personnel services.
3. Sample handbook.

E. Attitudes
1. Sincerity
2. Diplomacy

IX. Complete/Submit Final Personnel Paperwork

A. Steps
1. Secure new employee's signed W 4, etc.
2. Orient new employee to personnel services.
3. Return all applications/data to Personnel Department.
4. Finalize paperwork with Personnel Department.
5. Give employee an Employee Handbook.

B. Standards
1. Describe the follow-up procedures when a new employee is hired.
2. List 4 out of 5 objectives--80%.

C. Materials and Supplies--See IV. and V. C. above

D. Required Knowledge
1. Organizational structure
2. Oral communication
3. Staffing policy
4. Legal considerations in staffing
5. Records management

E. Attitudes
1. Attention to detail
2. Mutual support
3. Sense of accomplishment

CATEGORY J: PURCHASE AND MAINTAIN OFFICE SUPPLIES AND EQUIPMENT

I. Identify and Justify Need

A. Steps
1. Determine use of item.
2. Compare various types of items.
3. Select appropriate item.

4. Document need if not standard replacement.
5. Solicit user's input.

B. Standards

1. Simulation exercise (may be computer simulation)
2. 80% accuracy
3. Objective Test

C. Materials and Supplies

1. Catalogs
2. Brochures/Equipment
3. Handouts
4. Computer
5. Simulation software

D. Required Knowledge

1. Math functions
2. Cost/benefit ratios
3. Appropriate use of articles/supplies/office equipment
4. Cost recovery systems
5. Computer access
6. Oral and written communication
7. Purchasing system concept
8. 10-key calculator

E. Attitudes

1. Flexible
2. Critical Analysis
3. Assertive

II. Identify Source and Cost

A. Steps

1. Locate businesses that sell product.
2. Solicit vendor demonstrations.
3. Compare characteristics of items.
4. Obtain verbal quote.
5. Determine if rent, purchase, or lease.
6. Inquire about service contracts.

B. Standards

1. Given 3 brochures, summarize advantages and disadvantages of each piece of equipment.
2. Compare functions/use of each

C. Materials and Supplies

1. Equipment evaluation handouts
2. Transparencies
3. Catalogs
4. Yellow pages

D. Required Knowledge--See I. D. above

E. Attitudes

1. Critical thinking
2. Attention to details
3. Good judgement

III. **Obtain Approvals**

A. **Steps**
1. Requisition product.
2. Present cost analysis.
3. Follow purchasing system requirements.

B. **Standards**
1. Prepare a cost analysis comparing two similar machines or supply items.
2. 80% accuracy

C. **Materials and Supplies**
1. Case studies
2. Sample reports of cost analyses.

D. **Required Knowledge**--See I. D. above

E. **Attitudes**
1. Committed to job
2. Attention to details

IV. **Process and Follow-Up on Order**

A. **Steps**
1. Request written bids, if necessary.
2. Type purchase order.
3. Store supplies in appropriate place upon return of correct item.
4. Return any unusable items for credit.
5. Inventory fixed assets.

B. **Standards**
1. Objective test of retail and wholesale math problems relating to purchasing and inventory methods.
2. 90% accuracy

C. **Materials and Supplies**
1. Sample purchase orders
2. Credit memos
3. Inventory software or computer printout.

D. **Required Knowledge**
1. See I. D. above
2. Keyboarding business forms
3. Business math

E. **Attitudes**
1. Sense of responsibility
2. Dependable

V. **Inventory Items**--See IV. A-E. Above

VI. **Train Users**

A. **Steps**
1. Return/register warranties.
2. Develop proper usage techniques.
3. Demonstrate proper usage to others.

B. **Standards**
   1. Demonstrate a new piece of equipment or technique to another.

C. **Materials and Supplies**
   1. Sample warranties
   2. Office equipment
   3. Copiers
   4. Computers
   5. Calculators
   6. Supplies, etc.

D. **Required Knowledge**
   1. See I. D. above
   2. Business/Office machines
   3. Supplies selection
   4. Demonstrating techniques

E. **Attitudes**
   1. Helpful
   2. Patience
   3. Manage stress

CATEGORY K: DEVELOP AND MAINTAIN PERSONNEL PAYROLL RECORDS

I. Set Up Individual Personnel Records

A. **Steps**
   1. FLSA requires employers to maintain the following: Name, home address, birth date (if employee is under age), sex, occupation, hour and day work week begins.

B. **Standards**
   1. 100% accuracy accessing and inputting to computer program.
   2. Investigate the wage and hour laws in your state
   3. Prepare a 5-page report
   4. 90% subjective evaluation

C. **Materials and Supplies**
   1. Salary Administration Policies-handouts
   2. Transparencies
   3. Software/Payroll and data base
   4. Cases
   5. Simulations

D. **Required Knowledge**
   1. Organizing skills
   2. Records management system
   3. 10-Key calculator/business math
   4. Federal and State government legislation re:FLSA
   5. Computer payroll
   6. System-data base
   7. Payroll accounting system
   8. Financial record keeping

E. **Attitudes**
   1. Handles confidentiality
   2. Attention to detail
   3. Dependable

II. **Collect Employee Data**

A. **Steps**
1. Regularly hourly pay rate, hours worked
2. Each workday and total hours each workweek.
3. Total daily on weekly straight-time earnings.
4. Total overtime pay for the workweek.
5. Deductions or additions to wages.
6. Total wages paid each pay period.
7. Date of payment and pay period covered.
8. Input into data base.

B. **Standards**
1. Objective math test relating to payroll
2. 90% accuracy

C. **Materials and Supplies**
1. Calculators
2. Case studies/problems

D. **Required Knowledge**
1. Business math/payroll
2. Calculator or computer use

E. **Attitudes**--See I. E. above

III. **Implement Personnel Policy/Procedures/Regulations**

A. **Steps**
1. Follow the salary administration system.
2. Control costs to reflect value.
3. Maintain standard levels for comparable jobs.
4. Adapt salary levels to local labor market.
5. Motivate employees to excel.
6. Promote goodwill between managers and employees.
7. Update/review system periodically.

B. **Standards**
1. Write a report reviewing a case study relating to salary administration system
2. Write a paragraph on incentive programs in the report.

C. **Materials and Supplies**
1. Films, videos, projectors
2. Cassettes
3. Case studies

D. **Required Knowledge**
1. Staffing system policies
2. Math computations
3. Cost/benefit ratios
4. See II. D. above
5. Management techniques and theory

E. **Attitudes**
1. Leadership
2. Mutual support

IV. **Maintain Personnel Files Continuously**

A. **Steps**
1. Manually or electronically update files.
2. Download information weekly or make back-up.

B. **Standards**
1. Demonstrate via manual or electronic system on a case study how files are updated.
2. 100% accuracy

C. **Materials and Supplies**
1. Computer
2. Software
3. Accounting ledger

D. **Required Knowledge**
1. Records management
2. Computer usage
3. Accounting for payroll, taxes, etc

E. **Attitudes**
1. Attention to details
2. Dependable

V. **Process Payroll**

A. **Steps**
1. Notify/communicate with Computer Department.
2. Make any valid adjustments.
3. Follow system procedures.

B. **Standards**
1. Run a payroll program for a two-week payroll
2. 100% accuracy

C. **Materials and Supplies**
1. Computer
2. Payroll software
3. Case studies
4. Simulations

D. **Required Knowledge**--See IV. D. above

E. **Attitudes**
1. Dependable
2. Handles confidentiality/pressure/deadlines
3. Attention to details

VI. **Disburse Payroll**

A. **Steps**
1. Receive payroll as per system.
2. Disburse payroll as per system.

B. **Standards**--See V. B. above

C. **Materials and Supplies**--See V. C. above

D. **Required Knowledge**--See IV. D. above

E. **Attitudes**--See V. E. above

VII. **Follow-Up and Verify All Records**

A. **Steps**
1. Maintain monthly reports (tapes, budget, etc.)
2. Receive updates and input into system.
3. Prepare annual reports.
4. Prepare tax reports as required.

B. **Standards**
1. Given a case study, prepare the financial statements necessary.
2. Compute the tax liability and write a narrative explaining reasons for them.

C. **Materials and Supplies**
1. Case studies
2. Simulations
3. Handouts
4. Transparencies

D. **Required Knowledge**
1. Tax accounting
2. Financial statement preparation
3. See I. D. above

E. **Attitudes**--See V. E. above

CATEGORY L: ASSIST WITH DEPARTMENTAL FINANCIAL PLANNING

I. **Review Previous Year's Budget**

A. **Steps**
1. Analyze budget variances.
2. Determine factors causing deviation.
3. Discuss plans with leaders.

B. **Standards**
1. Prepare your personal budget for next month.
   a. Classify expenses as fixed, variable or semi-variable.
   b. Explain the classifications assigned.
   c. Explain how budget variances are investigated.
2. 90% subjective

C. **Materials and Supplies**
1. Sample budgets/cases
2. Handouts or transparencies

D. **Required Knowledge**
1. Budget terminology
2. Accounting/financial statements
3. Decision making
4. Business math

E. **Attitudes**
1. Good judgement
2. Open-minded
3. Committed to job

II. **Project/Prioritize Current Needs**

A. **Steps**
1. Review organizational goals.
2. Determine department plans.
3. Determine level of project sales/services.
4. Enlist aid of department employees.

B. **Standards**
1. Interview an office manager of an organization in the community.
2. Write a report answering the following questions:
   a. What are the steps in the budgeting system?
   b. Who assists in preparing the office budget?
   c. What kind of review process is used?
3. 90% objective evaluation

C. **Materials and Supplies**
1. Sample organizational policies
2. Handouts on budget system

D. **Required Knowledge**
1. Cost control analysis/measures
2. Computational skills
3. See also I.D. above

E. **Attitudes**
1. Career vs. Job
2. Open-minded
3. Committed to job

III. **Justify/Document Needs**

A. **Steps**
1. Discuss plans of accomplishing goals with employees.
2. Prepare justification for any unusual items/requests.
3. Make detailed statement of needed employees, space, equipment, and supplies.

B. **Standards**
1. Write a short report on the controlling costs in the correspondence department when given a case study.
2. 90% subjective evaluation

C. **Materials and Supplies**
1. Film
2. Case studies
3. Sample goal statements

D. **Required Knowledge**
1. Written and oral communications
2. See also I. and II. D. above

E. **Attitudes**
1. Sense of responsibility

IV. **Establish Budget**

A. **Steps**
1. Develop office budget based on organizational goals and departmental action (maybe zero-based) plans.
2. Combine office budget with department budget.

B. **Standards**
1. Given a case study, prepare a yearly operating budget for a specific department.
2. 90% objective evaluation

C. **Materials and Supplies**
1. Case studies
2. Worksheets for application of cases

D. **Required Knowledge**
1. See I.D., II.D., and III.D. above

E. **Attitudes**
1. Attention to details

V. **Make Presentation to Management**

A. **Steps**
1. Attend budget planning session.
2. Present combined department budget to management.
3. Defend proposed area budget when called upon.

B. **Standards**--See III. and IV. B. above

C. **Materials and Supplies**
1. Case studies

D. **Required Knowledge**--See I-IV D above

E. **Attitudes**--See I-IV E above

VI. **Obtain Approval**

A. **Steps**
1. Office services are considered.
2. Administrative expense.
3. Justify any capital outlay.
4. Classify fixed, variable, and semi-variable costs.
5. Classify direct and indirect costs.

B. **Standards**--See I. B. above

C. **Materials and Supplies**--See I. C. above

D. **Required Knowledge**--See I-IV. D. above

E. **Attitudes**--See I-III. E. above

VII. **Rework Budget, As Needed**

A. **Steps**
1. Resolve conflicts among users.
2. Adjust requested items.
3. Finalize budget.

B. **Standards**--See IV. B. above

C. **Materials and Supplies**--See IV. C. above

D. **Required Knowledge**--See I-III. D. above

E. **Attitudes**--See I-III. E. above

VIII. **Monitor Rates of Expenditures**

A. **Steps**
1. Control department performance.
2. Systematic review of expenditure reports.
3. Control resources efficiently.
4. Communicate with subordinates regarding periodic budget analysis.

B. **Standards**--See III. B. above
C. **Materials and Supplies**--See I. and III. C. above
D. **Required Knowledge**--See I-III. D. above
E. **Attitudes**--See I-III. E. above

IX. **Take Necessary Action**--See VIII above

CATEGORY M: COORDINATE/SUPPORT COMPANY INVOLVEMENT IN INTERNAL/EXTERNAL PROJECTS

I. **Identify Responsibilities in Project**

A. **Steps**
1. Gather information on project (if delegated to do so.)
2. Internal projects may involve committee assignment.
3. Find out co-workers and learn what your role will be.

B. **Standards**
1. Case study, working in group.

C. **Materials and Supplies**
1. Cases
2. Project for group
3. Creative games

D. **Required Knowledge**
1. Good listening skills
2. Summarizing
3. Researching
4. Problem solving
5. Decision making
6. Participative management

E. **Attitudes**
1. Accepts assignment willingly
2. Team player
3. Shares responsibility for project
4. People oriented

II. **Attend Organization Meetings**

A. **Steps**
1. Arrange schedule allowing your attendance at meeting.

2. Write notes relating to goals of committee and project.
3. Participate as appropriate.

B. Standards
1. Cases
2. Role-playing
3. Simulations
4. 90% subjective evaluation

C. Materials and Supplies
1. Simulations for group

D. Required Knowledge
1. Oral and written communication
2. Good listening skills

E. Attitudes
1. Creative
2. Team player

III. Research/Communicate Related Information

A. Steps
1. Prepare input in relation to project.
2. Give input as per instructions or spontaneously.

B. Standards
1. Summarizing on cases
2. Research

C. Materials and Supplies
1. Cases
2. Library study
3. Give oral report on a group consensus

D. Required Knowledge
1. Oral communication
2. Written communication
3. Summarizing

E. Attitudes
1. Enthusiastic
2. Team player
3. Task oriented

IV. Set Up Meetings as Appropriate

A. Steps
1. Notify other committee members of tentative arrangements.
2. Set definite time and date according to survey.
3. Select room or place for meeting.
4. Notify (either oral or written) committee members of final arrangements.
5. Get or select special equipment or requirements.

B. Standards
1. Simulations
2. Exercise role-playing
3. 90% accuracy

C. **Materials and Supplies**
   1. Calendars
   2. Cases for discussion

D. **Required Knowledge**
   1. Telephone skills
   2. Group work

E. **Attitudes**
   1. Team work
   2. Flexible
   3. Assertive
   4. Sense of responsibility

V. **Recruit/Support as Appropriate**

A. **Steps**
   1. Persuade others to participate if an external project.
   2. Internal projects are mandated usually.
   3. Write requests for information or assistance.
   4. Write appeals for donations or contributions.
   5. Sell or service on an idea.

B. **Standards**
   1. See Q: Prepare Written Communication

C. **Materials and Supplies**
   1. Software, Computers, cases for request letters.
   2. Video on persuasive speaking.

D. **Required Knowledge**
   1. Oral and written communication
   2. Word processing

C. **Attitudes**
   2. Sense of responsibility

VI. **Do Necessary Follow-Up & Maintain Records**

A. **Steps**
   1. Keep records of all minutes, correspondence, goals, etc.
   2. Check on details of project.
   3. Communicate with others on committee as appropriate.
   4. Give progress reports as appropriate

B. **Standards**
   1. 90% simulation

C. **Materials and Supplies**
   1. Cases for discussion

D. **Required Knowledge**
   1. Abstracting
   2. Summarizing
   3. Oral communication
   4. Summarizing skills

E. **Attitudes**
   1. Attention to details
   2. Efficient

VII. **Publicize Project**

A. **Steps**
1. Write news release notes or final copy.
2. Notify media-newspapers, radio, etc.
3. Notify internal office or public relations.
4. Distribute memo to all internal departments.

B. **Standards**
1. Write news release giving all pertinent information.

C. **Materials and Supplies**
1. Sample cases for discussion
2. Handouts
3. Transparencies

D. **Required Knowledge**
1. Written and oral communication
2. News releases
3. Keyboarding
4. English usage

E. **Attitudes**
1. Enthusiastic
2. Factual
3. Conscientious

VIII. **Collect/Disburse/Report Donations**

A. **Steps**
1. Collect all funds relating to project.
2. Document all contributions.
3. Prepare summary of each deposit.
4. Deliver funds to agency or proper place.

B. **Standards**
1. Prepare or report from case study.
2. 90% accuracy

C. **Materials and Supplies**
1. Cases
2. Simulations
3. Computer
4. Typewriter

D. **Required Knowledge**
1. Accounting
2. Computations
3. Report writing
4. Summarizing skills
5. Keyboarding

E. **Attitudes**
1. Dependable
2. Loyal
3. Honest

IX. Document Outcomes and Make Final Report

A. Steps
1. Gather all materials and documents.
2. Prepare summary draft of final.
3. Edit report.
4. Prepare visual aids.
5. Keyboard final report.
6. Present oral report as required.

B. Standards
1. Prepare a written report with specific points for content and mechanics.
2. 80% on acceptable points.

C. Materials and Supplies
1. Samples of types of reports
2. Transparencies showing parts of report--cover letter, title page, table of contents, illustrations, body, abstract, bibliography, appendixes, index, presentation graph
3. Software
4. Computer or typewriter

D. Required Knowledge
1. Keyboarding
2. Word processing
3. English usage
4. Grammar
5. Spelling
6. Punctuation
7. Summarizing/Abstracting
8. Writing business documents
9. Making an outline
10. Oral communication

E. Attitudes
1. Attention to detail

CATEGORY N: HANDLE TRAVEL ARRANGEMENTS

I. Set Up Trip File Folder

A. Steps
1. Prepare file label/folder.
2. Gather documents available.
3. Place all in folder.

B. Standards
1. 95% accuracy
2. List items in completed file.

C. Materials and Supplies
1. Sample travel folder with appropriate items

D. Required Knowledge
1. Records management
2. Company travel policy

E. Attitudes
1. Attention to detail
2. Follow through

II. **Obtain Necessary Approvals**

A. **Steps**
1. Submit travel request.
2. Document purpose of trip.
3. Estimate funds needed.
4. Consult company policies/procedures.

B. **Standards**
1. Prepare written travel proposal according to case study.
2. 90% subjective evaluation

C. **Materials and Supplies**
1. Handouts/Cases
2. Samples of travel request forms

D. **Required Knowledge**
1. Time management
2. Written communication

E. **Attitudes**
1. Positive attitude

III. **Identify Travel Schedule**

A. **Steps**
1. Determine dates of travel.
2. Determine times.
3. Identify destination or route if multiple purpose trip.
4. Identify departure terminal.

B. **Standards**
1. Role play discussion of travel arrangements with principal.
2. 90% subjective evaluation

C. **Materials and Supplies**
1. Problem solving cases
2. Sample passports, visas, and certificates

D. **Required Knowledge**
1. Keyboarding
2. Computer/Word Processing
3. Travel/Resource techniques
4. Know national and international time zones
5. How to obtain international documents

E. **Attitudes**--See I.E. above

IV. **Review and Critique Travel Requirements**

A. **Steps**
1. Gather preferred dates/times/modes of travel.
2. Call travel agency for information.
3. Ascertain various airlines, accommodations, special connections, flights, etc. and report to principal.
4. Obtain car rental information.

B. **Standards**
   1. Using the appropriate reference books, report on availability of times, places, modes of travel in response to a case study. For instance, if you travel by air will you have a direct, nonstop or connecting flight and on which airlines? What will car rental costs be when you arrive?
   2. 90% objective evaluation

C. **Materials and Supplies**
   1. Official Airline Guide
   2. Hotel/Motel Red Book Guide

D. **Required Knowledge**
   1. Telephone etiquette
   2. Know how to read timetables
   3. Time zones

E. **Attitudes**
   1. Self-motivated
   2. Flexible

V. **Make Reservations**

A. **Steps**
   1. Call travel agency with specified data.
   2. Make reservations (hotel, travel, car.)
   3. Arrange for tickets (mail or pick-up.)
   4. Send registration forms to conference.

B. **Standards**--See IV. B. above
C. **Materials and Supplies**--See I-IV. C. above
D. **Required Knowledge**--See IV. D. above
E. **Attitudes**
   1. Attention to detail
   2. Sense of responsibility

VI. **Prepare Paperwork**

A. **Steps**
   1. Submit purchase order to business office.
   2. Follow system procedures for travel request.
   3. Submit advance request for funds, if applicable.
   4. Make copies for trip folder.

B. **Standards**--See II. B. above
C. **Materials and Supplies**--See I-V. C. above
D. **Required Knowledge**--See I-V. D. above
E. **Attitudes**--See I-V. E. above

VII. **Confirm Arrangements**

A. **Steps**
   1. Ask travel agent to confirm.
   2. Ask hotel to confirm in writing.
   3. Make copies of all documents for Trip Folder and file.

B. **Standards**--See I-VI. B. above
C. **Materials and Supplies**--See I-VI. C. above

D. **Required Knowledge**--See I-VI. D. above
E. **Attitudes**--See I-VI. E. above

VIII. Prepare Trip Itinerary

A. **Steps**
1. Keyboard itinerary stating date/time of departure, destination--city and hotel (list address of hotel and phone number) note whether guaranteed arrival.
2. Do above for each day of trip. Document appointments' place and time, with whom.
3. Prepare copy of entire trip for executives' family if requested.
4. Prepare each day's activities on 3x5 cards to be carried in pocket.
5. Place complete copy in trip folder.

B. **Standards**
1. Prepare itinerary from the information given.
2. 95% objective evaluation

C. **Materials and Supplies**
1. Sample itineraries
2. Case studies
3. 3x5 cards

D. **Required Knowledge**
1. Written communications
2. Word processing

E. **Attitudes**--See I. E. above

IX. Obtain Travel Documents

A. **Steps**
1. Pick up tickets.
2. Pick up advance funds/credit cards.
3. Secure international passport, etc.

B. **Standards**
1. Write a short report on obtaining travel documents.
2. 90% objective evaluation

C. **Materials and Supplies**--See III. C. above
D. **Required Knowledge**--See III. D. above
E. **Attitudes**--See I. and II. E. above

X. Arrange Management Coverage

A. **Steps**
1. Assume responsibility for routine office activities during executive's absence.
2. Prepare memo to others in office of executive's absence according to policy.

B. **Standards**
1. Write a short report of what your role is in boss's absence.
2. 90% subjective evaluation

C. **Materials and Supplies**
   1. Film or role playing script
D. **Required Knowledge**
   1. Oral and written communications
   2. Role and scope of administrative support
E. **Attitudes**
   1. Sense of responsibility

XI. **Prepare Expense Report Following Company Policy**

A. **Steps**
   1. Gather all receipts, invoices, etc.
   2. Summarize according to forms used.
   3. Total all columns.
   4. Keyboard report and submit with receipts.
B. **Standards**
   1. Prepare an expense report from a case study.
C. **Materials and Supplies**
   1. Case study
   2. Work sheets
   3. Sample receipts
   4. Invoices
D. **Required Knowledge**
   1. Business math
   2. Word processing
   3. Accounting
E. **Attitudes**
   1. Assertive
   2. Attention to detail

XII. **Reconcile Travel Funds**

A. **Steps**
   1. Request further funds if limit exceeded, as per policy.
   2. Return any unused funds, as per policy.
B. **Standards**--See XI. B. above
C. **Materials and Supplies**--See XI. C. above
D. **Required Knowledge**--See VI. D. above
E. **Attitudes**--See I. E. above

XIII. **Prepare Follow-Up Documentation, Correspondence, & Reports**

A. **Steps**
   1. Prepare report from notes submitted.
   2. Keyboard cover memo as per policy.
   3. Attach finance report of trip, if required.
B. **Standards**
   1. Prepare a report from a case study--See II. B. above.
   2. 90% objective evaluation.
C. **Materials and Supplies**--See XI. C. above
D. **Required Knowledge**--See XI. D. above
E. **Attitudes**--See XI. E. above

CATEGORY O: SET UP AND MAINTAIN OFFICE FILING SYSTEM

I. Review and Follow Company Records Management Policy

A. Steps

1. Read the company policy regarding records system.
2. Study the systems resources (people, space, equipment, forms and related records, and data to be processed) that work together to achieve the systems' goal.
3. If no policy is documented, design a records management manual for creation, distribution, utilization, storage, retrieval, protection, preservation, and final disposition of records. This handbook will establish responsibility, standardize procedures, and aid in training employees.

B. Standards

1. 90% accuracy on objective tests
2. Know systems elements with 100% accuracy.
3. Set up a system for a new faculty member who needs to get a system working

C. Materials and Supplies

1. Sample company policy--Practice Set
2. Overheads showing system flow of information
3. Filmstrip or video of an excellent model

D. Required Knowledge

1. Basic filing rules
2. Organization skills
3. Decision making
4. Problem solving process
5. Basic system concepts
6. Work simplifications or system's approach
7. Government legislation of records
8. Records storage system and methods
9. Abstracting/Summarizing
10. Oral and Written communication

E. Attitudes

1. Common sense
2. Intuition
3. Good Judgement
4. Attention to detail
5. Maintains confidentiality

II. Identify Needed Files/System

A. Steps

1. Analyze present system--streamline what you have or set up a new system.
2. Determine whether manual or electronic method.

3. Inventory records in office areas. Determine name and number of the record, purpose of each, volume and frequency of use, nature, retention, method of storing, distribution and location of each copy of the record, quantity in cubic feet, file drawers, name of person or department responsible for controlling the record.
4. Determine value of each record (administrative, fiscal, legal or historical) to the organization.
5. Determine type of storage method, i.e., alphabetic, numeric, geographic, subject or chronological.
6. Assess system for cost reduction.
7. Sell the records management program to management.

B. Standards

1. 90% accuracy for objective tests
2. Be able to write the sequence of determining need by listing 8 out of 12 major considerations in each analyzing system.
3. Name and use 4 out of 5 storage methods. List similarities and differences between the various records storage methods. Explain how alphabetizing is used in other storage methods.

C. Materials and Supplies

1. Samples of records
2. Overheads
3. Inventory forms
4. Measuring devices
5. Equipment to be viewed or photographs of equipment to be viewed.
6. Samples of various types of storage methods (alphabetical, numerical, etc.)
7. Retention schedule
8. Field experiences (library, offices)

D. Required Knowledge

1. Cost analysis--Basic Filing Rules
2. System analysis
3. Computational and measuring skills
4. Decision making
5. Management functions

E. Attitudes

1. Good judgement
2. Loyalty
3. Patience
4. Handles confidentiality
5. Assertive
6. Cooperative

III. Order Needed Materials/Equipment

A. Steps

1. Conduct a use analysis
2. Ensure that all employees use a standard system.

3. Research types of applicable equipment: vertical, lateral, open-shelf, visible, mechanized, mobile, special media or electronic files.
4. Justify equipment required.
5. Compare type and volume of records to be started and retrieved.
6. Order supplies equipment needed.

B. Standards

1. 90% accuracy on objective tests.
2. Identify the basic types of storage equipment for paper records.
3. Identify four kinds of storage supplies.
4. Explain difference in a storage system and a storage method.
5. Explain terms used in a records storage system.

C. Materials and Supplies

1. Variety of storage supplies (labels, folders, tabs, sorters, guides, file boxes, etc.)
2. Transparencies
3. Field experience
4. Catalogs
5. Photographs/slides of equipment
6. Roll-a-dex
7. Index guides
8. Card files

D. Required Knowledge

1. Basic filing rules
2. Oral and written communication
3. Decision making
4. Problem solving
5. Measurement computations
6. Organizational skills

E. Attitudes

1. Cooperation
2. Common sense
3. Good Judgment
4. Attention to detail
5. Flexible
6. Task oriented

IV. Organize Needed Information and File System

A. Steps

1. Identify the records--Inspecting.
2. Classify into categories--Indexing.
3. Mark record to indicate name, number or subject of each unit--coding.
4. Observe whether record should have a cross reference.
5. Gather records into specific files by sorting.
6. Keep within guidelines of system and storage method for storing.

B. **Standards**
   1. Demonstrate on an objective test with 90% accuracy.
   2. List the kinds of alphabetic arrangements one encounters in everyday life.
   3. Identify the six in order for storing a record properly.
   4. Identify advantages and disadvantages for storing in alphabetic method.
   5. Explain several advantages and disadvantages of using subject and numeric files.

C. **Materials and Supplies**
   1. Variety of records
   2. Practice set
   3. 3x5 cards
   4. Typewriter
   5. Transparencies of examples of each type of storage method.
   6. Transparencies of cross referencing situations.
   7. Sorting equipment/supplies

D. **Required Knowledge**
   1. Basic filing rules
   2. Good reading skills
   3. Keyboarding skills
   4. Good spelling
   5. All alphabetic index rules- Index, code and arrange in alphabetic order personal and business names.
   6. Index and code in alphabetic order identical names, business names composed of single letters, names containing prepositions, conjunctions, articles, symbols and numbers.
   7. Index code and arrange in alphabetic order names of schools, religious institutions, organizations and associations, financial institutions, guardians, trustees, receivers, agents, newspapers, periodicals, other publications, U.S. government and foreign government names.
   8. Know the correct cross-referencing.
   9. Selection of subject categories judiciously to be used within an alphabetic arrangement.
   10. Decision making

E. **Attitudes**
   1. Task oriented
   2. Attention to detail
   3. Good judgement
   4. Positive attitude
   5. Loyalty
   6. Sense of responsibility
   7. Pride
   8. Commitment to job
   9. Dependable

V. Prepare File Index

A. Steps

1. Describe system file index in book form.
2. Keep one copy in front of first storage location.
3. Distribute a copy to all managers or responsible parties who will be in charge of various locations.
4. Indicate a left-to-right arrangement of file cabinets, dividers, primary guides, secondary guides, etc.

B. Standards

1. 95% accuracy on objective case study
2. From a list of a variety of subjects/situations set up an index of primary and secondary file topics for file guides.
3. Show correct placement of label/guides.
4. Prepare an index for a new faculty member's filing system relating to division files.

C. Materials and Supplies

1. Practice set
2. Transparencies of sample indexes
3. File folders, guides, labels

D. Required Knowledge

1. Oral and written communication
2. Keyboarding
3. Formal reports/outlines
4. Basic filing rules

E. Attitudes

1. Dedication
2. Helpfulness
3. Consistent
4. Dependable

VI. Train Users

A. Steps

1. Explain system and storage method to each user.
2. Present each new employee a written summary of file index.
3. Require new employees to read and follow system policy.
4. Inform all employees, in writing, of retention policy.

B. Standards

1. State objectives to be learned
2. Explain how to train and examine to see if learning has taken place.
3. Role playing
4. Training situation with 90% accuracy
5. Write a memo stating retention policy of specific categories of files within a company.

C. **Materials and Supplies**
   1. Sample policy and file index
   2. Typewriter/computer

D. **Required Knowledge**
   1. Oral communication
   2. Problem solving
   3. Written communication
   4. Training techniques
   5. Keyboarding

E. **Attitudes**
   1. Helpfulness
   2. Friendliness
   3. Loyalty to company

VII. Maintain and Update Files

A. **Steps**
   1. Plan for day to day control by:
      a. Collecting records
      b. Screening records that should not be filed
      c. Preparing records for filing
      d. Indexing, coding and sorting records
      e. Filing
      f. Cross referencing
      g. Controlling records removal--charge out system
      h. Follow-up the record
      i. Consult policy for records transfer to semi-active or inactive storage
      j. Keep data base current for electronic files.

B. **Standards**
   1. 95% accuracy on objective tests
   2. Define how storage and retrieval are related
   3. Explain the procedures for control over stored records
   4. Explain requisition and charge out
   5. Explain "tickler file" and how it is used
   6. Describe various transfer methods and name at least three important points of the procedure (common methods, forms used, differences and reasons for transfer.)

C. **Materials and Supplies**
   1. Practice sets--cases
   2. Files, labels, guides, overheads
   3. 3x5 cards
   4. Tickler file
   5. Charge out guides, files
   6. Policy manuals
   7. Sorting aids
   8. Samples of colored materials for color usage
   9. Short computer exercise using filing/data base software

D. **Required Knowledge**
   1. Organizing skills
   2. Decision making
   3. Computer input skills
   4. Keyboarding

E. **Attitudes**
   1. Dedication
   2. Consistency
   3. Task oriented
   4. Efficiency
   5. Thorough
   6. Maintains confidentiality

VIII. Prepare for File Audits

A. **Steps**
   1. System evaluation is planned for--periodic audit.
   2. Define standards in the control process.
   3. Transaction documents are easily retrieved effectiveness measures, efficiency ratios.
   4. Controlling forms, correspondence, copying and costs.
   5. Vital records are kept in two locations.
   6. Important records are properly controlled.

B. **Standards**
   1. Explain the purpose for control process in a records system.
   2. Know number/use of each form used.
   3. Eliminate as many as possible.
   4. Standardize size and quality of paper.
   5. Ensure efficient design of forms, whether manual or automated.
   6. Establish efficient economic procedures for printing, storing and distributing forms to users.
   7. Set up both numerical and functional controls over forms.
   8. State ways to control correspondence and reprographics.
   9. Name other ways to control costs.
   10. Design a form.
   11. Know main elements in records system: personnel, space, equipment, and procedures.

C. **Materials and Supplies**
   1. Case studies
   2. Transparencies
   3. Sample forms
   4. Typewriter

D. **Required Knowledge**
   1. Benefits of standards
   2. Math computations
   3. Components of a system
   4. Decision making
   5. Systems analysis

E. **Attitudes**
   1. Efficiency
   2. Loyalty
   3. Sees value to the company
   4. Attention to detail

CATEGORY P: ARRANGE MEETINGS

I. **Identify Participants**

A. **Steps**
   1. Acquire names of committee members.
   2. Get phone numbers, addresses.
   3. Set up file re: project.
   4. Prepare a flow chart of projected project.

B. **Standards**
   1. 100% accuracy on practice set exercise

C. **Materials and Supplies**
   1. Simulations
   2. Practice set
   3. Sample progress charts
   4. Sample project files
   5. Phone list or book
   6. Computer/Word processor

D. **Required Knowledge**
   1. Good written/oral communication skills.
   2. Time management
   3. Records management
   4. Word processing/data base
   5. Time plans--Gantt, Pert charts

E. **Attitudes**
   1. Team player
   2. Flexible
   3. Handles stress/time constraints
   4. Self-starter
   5. Attention to detail
   6. Diplomacy
   7. Assertive
   8. Sense of responsibility

II. **Coordinate Calendars of Participants**

A. **Steps**
   1. Call or access calendars of each participant.
   2. Determine when each member is free to meet. (Best season\month\day)
   3. Set up a chart indicating frequency date/time selected.

B. **Standards**
   1. Given a case study, role play script and prepare a chart indicating participants' most accessible time to meet.
   2. 100% accuracy

C. **Materials and Supplies**
   1. Video/films/slides
   2. Computer software
   3. Simulation

D. **Required Knowledge**
   1. Logical organizational skills
   2. Telephone etiquette
   3. Computer input skills

E. **Attitudes**
   1. Assertive
   2. Good judgement

III. **Determine Date and Time**

A. **Steps**
   1. From chart of frequencies, select first and second choices.
   2. If time, give members choice of two selected times/dates.

B. **Standards**
   1. Select correct meeting date/time from a case study project.
   2. 100% objective evaluation

C. **Materials and Supplies**
   1. Telephone system
   2. PC's and software
   3. Calendar

D. **Required Knowledge**
   1. Summarizing and reporting
   2. Good listening skills

E. **Attitudes**
   1. Self-motivated
   2. Sense of responsibility

IV. **Arrange For Meeting Site**

A. **Steps**
   1. Know approximate size of site--rooms, buildings, place.
   2. Determine if funds are required.
   3. Call for oral quotes.
   4. Research available amenities (food, housing, equipment, conference room.)

B. **Standards**
   1. Given a case study, prepare a written report recommending site, meal, meeting room, etc. Give summary of all available information, then recommend.
   2. 90% objective evaluation

C. **Materials and Supplies**
   1. Software
   2. Case studies
   3. Role playing scripts
   4. Telephone system

D. **Required Knowledge**
   1. Making travel arrangements
   2. Teamwork
   3. Computations
   4. People interaction
   5. Telephone skills

E. **Attitudes**--See I. E. above

V. **Confirm Meeting in Writing/Request Participant Needs**

A. **Steps**
   1. Write letter to secure selected place, rate, etc.
   2. Secure all requirements in writing.
   3. State specifics in letter, i.e. a-v equipment, number of tables, chairs in each room, parking, meals, refreshments, etc.

B. **Standards**
   1. Given a case study, write a letter requesting meeting requirements. Ask for written confirmation.
   2. 100% objective evaluation

C. **Materials and Supplies**
   1. Computers/Word processors
   2. Software
   3. Case study example letters to critique

D. **Required Knowledge**
   1. Business communications
   2. Decision making
   3. Organizational skills

E. **Attitudes**
   1. Attention to detail
   2. Career vs. Job

VI. **Make Necessary Travel/Meeting Room & Participant Arrangement**

A. **Steps**
   1. Arrange for speakers/presenters.
   2. Research information for incoming travelers.
   3. Write them giving complete details.
   4. Ascertain further arrangements.
   5. Research telecommunications possibilities.

B. **Standards**
   1. Write requests, inquiries, persuasive and general good news correspondence.

C. **Materials and Supplies**
   1. Computer/Word processor
   2. Simulation exercises

D. **Required Knowledge**
   1. Business communications
   2. Library skills
   3. E mail
   4. Telephone skills
   5. Word processing

E. **Attitudes**--See I. E. above

VII. **Complete Necessary Paperwork and Documentation**

A. **Steps**
1. Arrange honorariums for speaker.
2. Write all participants/persons.
3. Submit registration.
4. Research desk-top publishing.
5. Secure printing of meeting materials.
6. Update flow chart of complete project.

B. **Standards**
1. Write general information letter and prepare flow chart of complete project. Include all steps of project.
2. 100% objective evaluation

C. **Materials and Supplies**
1. Computer/Word processor
2. Software
3. Simulation exercises

D. **Required Knowledge**
1. Duplication process
2. Business communications
3. Desk-top publishing principles
4. Word processing and mail-merge
5. Printing cost accounting
6. See also I. D. above

E. **Attitudes**--See I. E. above

VIII. **Reconfirm All Arrangements**

A. **Steps**
1. Double check all plans.
2. Give alternate directions in case of unforseen problem.
3. Have a back-up plan.
4. Verify extra personnel to be involved.
5. Brief all involved.

B. **Standards**
1. Write a back-up proposal for a simulation case.
2. 90% subjective evaluation

C. **Materials and Supplies**
1. Simulation cases

D. **Required Knowledge**--See I-VII. D. above

E. **Attitudes**
1. Career vs. Job
2. See also I. E. above

IX. **Prepare Related Meeting Resources**

A. **Steps**
1. Arrange for special guests.
2. Purchase special gifts, plaques.
3. Schedule tours, trips, dinners, vehicles, tickets, etc. as required.

4. Arrange for child care, personal needs.

B. **Standards**
   1. Prepare special considerations proposal for a meeting to be held in Galveston, Texas. Research some actual activities for men, women, children, and co-ed groups.
   2. 90% subjective evaluation

C. **Materials and Supplies**
   1. Computer/Word processor
   2. Software
   3. Newspapers
   4. Recreational brochures

D. **Required Knowledge**--See IV. and V. above

E. **Attitudes**--See I. E. above

X. **Complete Follow-Up Requirements(Letters, Certificates, Etc.)**

A. **Steps**
   1. Mail letters to participants as required--thank you's, any unfinished business, bills, etc.
   2. Mail certificates, acknowledgements.
   3. Send public relations correspondence to media.

B. **Standards**
   1. Write a thank you letter with enclosures and a news release for the local newspaper.

C. **Materials and Supplies**
   1. Computer/Word processor
   2. Software
   3. Sample news releases
   4. Sample transparencies

D. **Required Knowledge**
   1. Business communications
   2. Accounting
   3. Word processing
   4. Records management

E. **Attitudes**
   1. Diplomacy
   2. Committed to job

CATEGORY Q: PREPARE WRITTEN COMMUNICATION

I. **Gather/Record Information**

A. **Steps**
   1. Collect Information (taped, notes)
   2. Take minutes.
   3. Research files.
   4. Know audience/reader.
   5. Transcribe data from tape or shorthand.

B. **Standard**
   1. Attend a meeting, take minutes and transcribe in an appropriate format.
   2. 90% accuracy

C. **Materials and Supplies**
   1. Dictaphone
   2. Library access
   3. Reference manuals
   4. Computer software
   5. Word processor

D. **Required Knowledge**
   1. Word processing
   2. Shorthand
   3. Machine dictaphone
   4. Library skills
   5. Write reports
   6. Writing business correspondence
   7. English usage
   8. Listening skills

E. **Attitudes**
   1. Dependable
   2. Positive

II. **Draft Written Material**

A. **Steps**
   1. Compose routine business documents.
   2. Keyboard at computer or typewriter.
   3. Proofread copy.
   4. Print out copy.
   5. Store copy on disk (name, etc.)

B. **Standards**
   1. Write a memorandum explaining a change in procedure for the office personnel and solicit their support.
   2. 95% accuracy of content
   3. 100% mailable

C. **Materials and Supplies**
   1. Sample business correspondence
   2. Letterheads
   3. Memo forms
   4. Word Processor
   5. Computer
   6. Printer
   7. Copier

D. **Required Knowledge**
   1. Word processing
   2. Language arts Skills
   3. Grammar/English usage
   4. Spelling
   5. Capitalization
   6. Punctuation
   7. Records management

E. **Attitudes**
   1. Attention to detail

III. **Critique/Edit Written Materials**

A. **Steps**
1. Read draft.
2. Enter proofreaders marks.
3. Critique by principal, if necessary.
4. Reinsert disks and call up program.
5. Consult directory as needed.
6. Edit for final copy.
7. Store and print copy and copies.

B. **Standards**
1. Keyboard final edited copy from proofreader's rough draft and print.
2. 100% accuracy

C. **Materials and Supplies**
1. Filing system
2. Diskettes/Computer
3. Software
4. Letter quality printer
5. Examples of documents to proofread
6. Proofreading exercises

D. **Required Knowledge**
1. Word Processing skills
2. Proofreaders marks
3. Format business documents

E. **Attitudes**
1. Willingness to make corrections
2. Committed to job

IV. **Obtain Signature/Approvals**

A. **Steps**
1. Notify principals of completion.
2. Obtain signatures/approvals.
3. Sign yourself, if appropriate.

B. **Standards**--See III. B. above

C. **Materials and Supplies**
1. Proofreading exercises

D. **Required Knowledge**--See III. D. above

E. **Attitudes**
1. Sense of responsibility

V. **Distribute Information**

A. **Steps**
1. Make copies.
2. Prepare envelopes and insert correspondence.
3. Send to post office or route internally.
4. Route electronic mail as applicable.

B. **Standards**
1. Assist with a mass mailout in the school offices.
2. Bundle same zip code areas and secure
3. May use mail merge to create envelopes electronically.

4. Demonstrate an electronic mail transmission or facsimile usage, if available.

C. **Materials and Supplies**
   1. Copier
   2. Sample envelopes
   3. Computer network system
   4. Facsimile usage

D. **Required Knowledge**
   1. Copier usage and care
   2. Word process
   3. Correct envelope preparation
   4. Electronic mail

E. **Attitudes**
   1. Handle confidentiality
   2. Assertive
   3. Flexible
   4. Dependable
   5. Attention to detail
   6. Loyalty

VI. Document Action

A. **Steps**
   1. Document to whom copies were sent.
   2. Apply electronic filing rules by storing document on disk.
   3. Make backup of disk as per system procedures.
   4. Maintain confidentiality as required.
   5. Follow records retention schedules.

B. **Standards**
   1. Print out a copy of your directory.
   2. Update or keep directory current--deleting unneeded files.
   3. Consult records retention schedules for accuracy, using a simulation exercise
   4. 90% accuracy

C. **Materials and Supplies**
   1. Simulation exercises
   2. Records management system

D. **Required Knowledge**
   1. Disk/File Management
   2. Word processing
   3. Records management systems

E. **Attitudes**
   1. Committed to job
   2. Attention to detail

Reference:

Tedesco & Mitchell, Administrative Office Systems Management, 2nd ed., Wiley, 1987

Johnson & Kallaus, Records Management, 4th ed., Southwestern, 1987

Office Administration
Program

Task/Course Identification

Program

Office Administrator

Task/Course Identification

Task/Competency	English 131	Typewriting 131	Typewriting 132	Shorthand 131	Shorthand 132	Business Math & Calculating Machines 141	Introduction to Business 131	Information/Word Processing 131	Cooperative Education 241	Accounting 131	Accounting 231	Computer Science 130	Information/Word Processing 142	Business Psychology 231	Management 231	Business Communication 231	Information/Word Processing 241	Economics 231	Economics 232	Business Law 231	Management 232	Cooperative Education 242
Synchronize Calendars (see boss)												✓										
Update/Rearrange Calendar												✓										
Review Daily Schedule With Manager												✓										
Keep Action File												✓										
Sort, Categorize, and Prioritize												✓										
Review for Actions and Meetings												✓										
Attach Back-up/Notes												✓										
Stamp Date Received												✓										
Note Necessary Follow-Up/Due Dates												✓										
Route Mail												✓										
Prepare Special mailings (Fed Express/Certified/Bulk/etc.)												✓										
Document Ongoing Correspondence												✓										
Follow Up on Action Correspondence												✓										
Review Deadlines and Establish Time Frames												✓										
Gather Information														✓								
Prioritize Work														✓								
Implement/Delegate Work Tasks														✓								
Follow Up on Delegated Work Tasks														✓								
Identify Need of Caller												✓										
Critique and Follow-Up on Request												✓										
Relay Messages												✓										
Project Professional Image/Provide Hospitable Atmosphere												✓										
Study/Stay Abreast of Company Regulations														✓								
Research/Clarify/Communicate Policies & Procedures														✓								
Establish/Communicate Job Standards & Expectations														✓						✓		
Interpret Policies & Procedures to New Employees/Employers																				✓		
Provide Documentation for Orientation of New Employees																				✓		
Establish Job Performance Plan														✓								
Act As Role Model												✓	✓									
Identify Need and Desired Results														✓								
Establish Procedures																✓						
Write Procedures																✓						
Compile Office Procedures Manual																✓						
Update Manual, Communicate Changes																✓						
Provide Ongoing Feedback																				✓		
Comply With Company Policies and Guidelines																				✓		
Schedule Performance and Appraisal Interview																				✓		
Conduct Interview																				✓		
Document Performance & Evaluation																				✓		
Identify Job Requirements																				✓		
Submit Paperwork for Position Approval																				✓		
Post/Advertise Job Openings																				✓		
Review Applications																				✓		
Interview Applicants																				✓		
Obtain Background/Medical Clearances on Selected Applicants																				✓		
Make Selection and Offer Position																				✓		
Notify Unselected Applicants																				✓		
Complete/Submit Final Personnel Paperwork																				✓		
Identify & Justify Need of Office Supplies & Equipment							✓					✓				✓						
Identify Source and Cost																✓						
Obtain Approvals																✓						
Process and Follow-Up on Order																✓						

(Over Please)

Task/Course Identification

Program: **Office Administrator**

(Continued) Task/Competency

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Inventory Items						✓																
Train Users														✓								
Set up Individual Personnel Records																				✓		
Collect Employee Data																				✓		
Process Payroll						✓																
Disburse Payroll						✓																
Follow-Up and Verify All Records											✓											
Review Previous Year's Budget											✓											
Project/Prioritize Current Needs											✓					✓						
Justify/Document Needs																✓						
Establish Budget											✓											
Make Presentation to Management															✓							
Obtain Approval															✓							
Rework Budget, As Needed											✓											
Monitor Rates of Expenditures														✓								
Take Necessary Action														✓								
Identify Responsibility in Project														✓								
Attend Organizational Meetings													✓									
Research/Communicate Related Information															✓							
Set up Meetings as Appropriate												✓										
Recruit/Support as Appropriate															✓							
Do Necessary Follow-Up and Maintain Records												✓										
Publicize Project															✓							
Collect/Disburse/Report Donations										✓					✓							
Document Outcomes and Make Final Report										✓					✓							
Set up Trip Folder												✓										
Obtain Necessary Approvals												✓										
Identify Travel Schedule (Date/Time/Location)												✓										
Review and Critique Travel Requirements												✓										
Make Reservations												✓										
Prepare Paperwork												✓										
Confirm Arrangements												✓										
Prepare Trip Itinerary												✓										
Obtain Travel Documents												✓										
Arrange Management Coverage														✓								
Prepare Expense Report Following Company Policy/Procedure										✓		✓										
Reconcile Travel Funds										✓												
Prepare Follow-Up Documentation, Correspondence & Reports															✓							
Review and Follow Company Records Management Policy												✓										
Identify Needed Files/System												✓										
Order Needed Materials/Equipment														✓								
Organize Needed Information and File System												✓										
Prepare File Index												✓										
Train Users of File System												✓										
Maintain and Update Files												✓										
Prepare for File Audits												✓										
Identify Participants												✓										
Coordinate Calendars of Participants												✓										
Determine Date and Time												✓										
Arrange for Meeting Site												✓										
Confirm Meeting in Writing/Request Participant Needs															✓							
Make Necessary Travel/Meeting Room & Participate Arrangements															✓							

(Over Please)

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Complete Necessary Paperwork and Documentation												✓										
Reconfirm All Arrangements												✓										
Prepare Related Meeting Resources												✓										
Complete Follow-Up Requirements (Letters, Certificates, Bills)															✓							
Gather/Record Information												✓										
Draft Written Material															✓							
Critique/Edit Written Materials															✓							
Obtain Signature/Approvals												✓										
Distribute Information																✓						
Document Action															✓							
Implement Personnel Policy/Procedures Regulations																				✓		
Maintain Personnel Files Continuously																				✓		

Curriculum Improvement Project

Real Estate Program Profiles for

*Agents
* Brokers

Developed by Carl Kenneth Sheffield
with cooperation from area Expert Workers

Prepared by
College of the Mainland

Through a Grant from Coordinating Board
Texas College and University System
PVEP 88-1030-20
Project Director: Dorothy E. McNutt, Ed.D.
Project Coordinator: Maryann Pringle
June 30, 1988

INTRODUCTION

Most educators would agree that the development of curriculum for a college program requires analysis and synthesis of several sources of input which might include: peers, other college programs, advisory committees, practioners, current texts and other literature and research. Educators may also conduct and use a local needs assessment/survey which might anticipate future developments and movements in the industry.

The College of the Mainland is currently involved in such an endeavor. We are attempting to reevaluate our real estate curriculum in an effort to attain a program which is exemplary and on the cutting edge of practice and theory. To that end a grant was secured which enabled us to perform a DACUM study. (DACUM is an acronym which stands for developing a curriculum and was researched by The Ohio State University). The result of our endeavor is contained in this booklet.

The process itself utilized sales agents or brokers from communities in the College of the Mainland district. These practitioners participated in a two-day workshop and identified specific duties which they, as sales agents and/or brokers perform within the scope of their businesses. These duties were subdivided into tasks or subsets. Tasks in each class, therefore, can be used to describe a duty.

A second requirement of the grant was to describe how these tasks (descriptors of a duty) could be taught in an academic setting and this report details possible sample procedures for teaching each of the tasks. You will note that some tasks are referenced to others within their own class. This is due to the somewhat overlapping aspects of some tasks. Further, some are . referenced to coop (cooperative education classes which provide college credit to students who work in a job directly related to real estate) because it is believed that some individual tasks would best be presented in a cooperative education/job related setting.

It should not be presumed that the curriculum which follows would constitute an entire program since it only reflects one single source, nor should it be assumed that the process for instruction which is presented for each task is the best, only, or most desirable in all cases. Rather, one should consider these tasks as those which may be included in a general real estate curriculum; and the suggested instructional processes presented herein should simply be viewed as possible methods of instruction or points of orientation from which a professor might use part, all, or merely the basic concepts presented to develop his/her own teaching method.

Carl Kenneth Sheffield, Real Estate Coordinator
Division of Business
College of the Mainland

REAL ESTATE AGENT
DACUM CHART

College of the Mainland
Division of Business
April 8, 1988

Real Estate Agent

REAL ESTATE AGENT JOB DESCRIPTION-A natural person who, for a compensation or in expectation of a compensation, is employed by or, as an independent contractor sponsored by a licensed real estate broker to do one or more of the acts set forth in the real estate license act of the State of Texas.

	DUTIES	Task Statements								
A	List Real Property	Collect Basic Data on Subject A1	Collect Data on Comparables A2	Analyze Data A3	Determine Market Value A4	Obtain Listing A5	Collect Specific Data A6	Process Listing A7	Service Listing A8	
B	Market Real Property	Plan Advertising Strategy B1	Write Ad B2	Arrange Agent Tours B3	Notify Other Offices B4	Canvas Neighborhood B5	Conduct Open House B6	Prepare Visual Aids B7	Cultivate Professional Contacts B8	
C	Sell Real Property	Fine Buyers C1	Assess Buyer's Needs C2	Show Property C3	Write Earnest Money Contracts C4	Negotiate Contracts C5	Open Title C6	Arrange Financing C7	Arrange For Inspections/Repairs C8	Schedule Closing/Funding C9
D	Manage Property	Secure Owner's Agreement D1	Maintain Records D2	Delegate Maintenance D3	Promote and Show Property D4	Assess Client's Needs D5	Process/Negotiate Transaction D6			
E	Appraise Property	Determine Type/ Purpose/Location of Appraisal E1	Negotiate Fee E2	Inspect Subject E3	Analyze Data E4	Reconcile Data E5	Prepare Appraisal Report E6	Present Appraisal E7		
F	Discover New Prospects	Join Service/ Community Organizations F1	Cultivate Key Contacts for Referrals F2	Contact FSB Owners F3	Make Cold Calls F4	Work Farm Areas F5	Contact Expired Listings F6	Write Newsletters F7	Send Mass Mailouts F8	
G	Schedule Activities	Manage Floor Time G1	Schedule Showings G2	Schedule Listings G3	Schedule Meetings G4	Schedule Presentations G5	Schedule Required Inspections/Surveys G6	Schedule Closings G7	Coordinate Miscellaneous Errands G8	
H	Continue Education	Attend Meetings/ Seminars H1	Take Courses H2	Read Periodicals H3	Learn OJT/From Experience H4					
I	Refer Relocation Prospects	Join Relocation Service I1	Contact Destination Agent I2	Negotiate Referral Fee I3	Inform Prospect of Referral I4	Verify/Follow-Up Results I5				
J	Keep Personal/ Business Records	Consult CPA J1	Record Receipts J2	Maintain Vehicle Records J3	Record Income/Expenses J4	Analyze Tax Liability J5				

KNOWLEDGE & SKILLS

Measure
Drafting
Telephone
Math
Listening
Map-reading
Surveys
Contracts
Title Commitments
Abstracts
Documentation (Document File History)

TOOLS & EQUIPMENT

M.L.S.
Video
Camera
Tape Measure
Telephone
Desk
Brief Case
Calculator
Typewriter
Computer
Copy Machine
Filing System
Business Cards
Auto (4-door)
Carseat
Log Book

ATTITUDES & BEHAVIORS

Positive
Work with Public
Empathy
Hungry/Aggressive
Show Respect
Tolerance
Ethics Professional
Persistent
Teachable
Open-minded
Self-motivated
Self-started
Entrepreneur
Optimist
Sense of Humor

FUTURE TRENDS

Fewer Dual Agencies
More Buyer Agencies
Increased Educational Requirements
Prof. Liability Insurance May Become Mandatory
More Lawsuits
Market is Improving Slowly
General Public is Becoming Better Informed of Market

REAL ESTATE SALESPERSONS PANEL

Sidney Greene - Century 21 K.E.Y. Realty
Sara Ann Groves - Action Realty
Brian Richmond - U.S.A. Realty
Robert Cardner - Village Properties
Mary Currie - Harryman Real Estate
Polly McCamey - Jenkins Real Estate
Tom Hanrahan - Village Properties
Jay Morris - Bayou Realtors
Pat Gallup - Diane Criss Realty

FACILITATORS

Joyce White
Maryann Pringle

Real Estate Agent Program Profile

REAL ESTATE AGENTS

CATEGORY A: LIST REAL PROPERTY

I. Collect Basic Data on Subject

A. Steps

1. Determine ownership and how title is held.
2. Obtain full legal description and copy of Homeowners Association Declaration and By Laws and other fee agreements.
3. Measure square footage of improvements and determine dimensions.
4. Determine lot/parcel dimensions.
5. Document existing financing, taxes, encumbrances, special assessments, and current assessed value.
6. Establish legal position (ownership) of all fixtures, built-in appliances, easements, right-of-ways, etc.
7. Examine zoning and special use permit records for any non-conforming use.
8. Check all add-ons and remodeling for building code compliance.
9. Determine supplier/source and adequacy of all utilities and sewer/septic tanks, etc.
10. Check all improvements regarding type, quality, and present condition of materials used in construction.
11. Record information concerning topography of property, and proneness to flooding.
12. Determine adequacy of police and fire protection.

B. Standards

1. Full and complete information accurately recorded.

C. Materials and Supplies

1. Tape measure
2. Grid paper, pencils, and recordkeeping book.
3. Maps of area

D. Required Knowledge

1. Ability to accurately take, compute, and record property information.
2. Understand and read/interpret accurately legal descriptions, mortgages, deeds of trust, and homeowners declarations.
3. Understand ad valorem tax statements.
4. Understand special real property terms, such as zoning, special-use permits, easements, fixtures, appurtenances, percolation, etc.

E. Attitudes

1. Detail oriented and perseverance/determination to obtain and record complete data and information about subject property.

II. Collect Data On Comparables--See Category G "Produce Income" Sales/Agent DACUM study.

III. **Analyze Data** - See Category A.

IV. **Determine Market Value**--See Category E.

V. **Obtain Listing**

A. **Steps**

1. Define, develop, and regularly work a "farm area".
2. Develop and daily maintain a recordkeeping system for your farm area and enter names and street addresses from tax rolls, etc. for all properties.
3. Systematically call on every property owner in the business farm promoting yourself, and company image (name, recognition, goodwill), and ask for new business.
4. Systematically survey and develop key contacts in your business area such as bank officers, trust department managers, clergy, etc. and ask for referrals of persons who may want to sell or purchase property.
5. Keep aware of new arrivals in the farm area.
6. Maintain a regular ongoing advertisement program.

B. **Standards**

1. Records must be maintained accurately and updated on a regular and continuing basis.
2. The farm area and solicitation of new business must be done on a daily basis.

C. **Materials and Supplies**

1. Maps of business area
2. Recordkeeping books/system
3. Automobile
4. Business cards, business stationary, pads of appropriate promulgated listing forms if such is required.
5. Telephone and/or answering service.

D. **Required Knowledge**

1. Training in sales and marketing which includes instruction relating to real estate "farming" techniques.
2. Competency in completing listing agreements and full and complete knowledge regarding the legal realities of such agreements.

E. **Attitudes**

1. Must be able to manage your own time and work the business farm each day and invest a full days work.
2. Be able to cope with a numerically high rejection rate and recognize achievement by the attainment of listings. Must not be inordinately affected by high rejection/listing rate. (It is common to the real estate business).

VI. **Collect Specific Data--See Roman Numeral I.**

VII. **Process Listing**

A. **Steps**

1. Using promulgated disclosure forms (where applicable) explain to seller the duties and responsibilities of the agency relationship and carefully detail the services which the agency will provide.
2. Carefully explain to seller the types of listing agreements weighing the advantages and disadvantages of each and discouraging net listing agreements.
3. Review with seller each item/entry on the listing agreement, specially explaining how deposits, and escrows, etc, will be handled.
4. After satisfaction that all parties to the transaction are competent and do in fact hold title to the property, negotiate the sales commission.
5. Estimate (competitive market analysis) fair market value and assist seller in establishing a listing price for subject property.
6. Explain to seller how current market conditions and physical conditions of the property could influence the price and/or marketability of the subject property.
7. Enter important and pertinent information gathered on subject property (see task #1 titled "Collect Basic Data on Subject") onto the listing agreement.
8. Detail what real or personal property is excluded from sale of the real property.
9. Explain to the seller requirements of fair housing legislation and how this will pertain to the manner in which you will show and market subject property.
10. Determine whether seller would be willing to finance any portion of the transaction.
11. Estimate for the seller the net proceeds if the property is sold in the price range listed.
12. Provide seller with copies of all documents prepared for their benefit (e.g., listing agreement, estimated costs, etc.).
13. Arrange to show property either by appointment or through open house arrangement.
14. Explain what showing of the house entails and suggest ways to safeguard property, such as remove all jewelry, guns, valuable antiques, etc. from premises before showing and explain the use of lock boxes.
15. Determine if there are any prospective buyers who saw the property before it was listed.

B. **Standards**
   1. The above tasks will be achieved through complete and comprehensive presentations to the sellers and a checklist should be completed verifying that each item 1 through 15 has been covered.

C. **Materials/Supplies**
   1. Appropriate promulgated forms where applicable.
   2. Cost estimate handbooks for use in calculating approximate closing costs.
   3. Small battery powered calculator.
   4. Title insurance cost card.
   5. Professional looking briefcase and/or file holder to carry documents, cost books, etc.
   6. Business calling cards and pens for signing documents.

D. **Required Knowledge**
   1. Thorough training and attained/proven competency in completing listing agreements.
   2. Competency in calculating costs involved in the sale of property.
   3. Competency to explain the legal impact of an agency/fiduciary relationship.
   4. Up-to-date knowledge pertaining to the (required) use of agency disclosure forms.

E. **Attitudes**
   1. Professional, dignified, business like approach at all times.

VIII. Service Listing

A. **Steps**
   1. Send marketing letters to and call all surrounding property owners.
   2. Send ad copy to seller to document agency marketing effort.
   3. Call seller at least weekly and discuss marketing progress and/or problems.
   4. Update financing information in file if cost and availability of mortgage funds changes.

B. **Standards**
   1. Complete each task at appropriate time interval during course of listing.

C. **Materials and Supplies**
   1. Copy of ads published in newspapers, etc.
   2. Office stationary and envelopes
   3. Current data/sheets detailing cost of mortgage money.

D. **Required Knowledge**
   1. Sources of and cost of mortgage money.
   2. Ability to analyze and suggest possible alternative mortgage financing possibilities to clients.

E. **Attitudes**

1. Professional attention to detail and willingness to keep abreast of rapidly changing conditions in the cost and availability of mortgage funds.

CATEGORY B: MARKET REAL PROPERTY

I. Plan Advertising Strategy

A. **Steps**

1. Determine which media sources to use.
2. Determine extent of target market.
3. Determine extent of advertising to reach target market.
4. Determine allowable budget and adjust advertising strategy to a cost within budget.

B. **Standards**

1. Required performance of steps 1-4 inclusive.

C. **Materials and Supplies**

1. List of advertising mediums which are active in and cover target market and cost data for their services.
2. Agency budget data regarding amount of funds available for advertising and office policy relating to allocation of these funds.

D. **Required Knowledge**

1. Competency/know how to effectively select and use media which would be effective in exposing real property listings to a target population which would be qualified to purchase.

E. **Attitudes**

1. Professional attention to budget constraints and ability to effectively use allocated advertising monies.
2. Sensitivity as to which advertising methods and sources would be best suited to the marketing of subject property.

II. Write Ad

A. **Steps**

1. Use abbreviated language and symbols appropriate to and customarily accepted in the real estate industry.
2. Use photo in ad if possible.
3. Use attention grabbing header.
4. Use action verb ending and give at least two telephone contacts which customers may call for additional information.
5. Highlight uniqueness and special attributes/uses of subject property.
6. Use color in ads if affordable.

B. **Standards**
   1. Ad costs must be within budget.
   2. Ad must detail name of agency or reflect that it is not a for sale by owner ad.
   3. Ad must attract attention and should contain action verbs to prompt prospects to act/respond to the advertisement.
   4. Ad should stand out and be different from other ad entries whenever possible.
   5. Keep records of all published ads and costs related thereto.

C. **Materials and Supplies**
   1. Copies of previously used ads which have proven to be effective.
   2. Cost data sheets from advertising companies, newspapers, etc.

D. **Required Knowledge**
   1. Know how to compose cost effective ads for real property.
   2. Know advertising mediums which can cover target population of the property which is to be advertised.
   3. Have complete information regarding cost of potential ads.

E. **Attitudes**
   1. Be sensitive to budget constraints.
   2. Be resourceful and imaginative with ads to avoid customer complacency (and inattention) to agency ads.
   3. Keep in mind which ads and medium have been effective in the past.

III. Arrange Agent Tours

A. **Steps**
   1. Send written invitation to and/or telephone cooperating agents.
   2. Set time and date and make transportation arrange ments.
   3. Prepare agent information data sheets and distribute same.
   4. Set alternate "rain out" date.
   5. Post in house (agency) notice re tours.

B. **Standards**
   1. Complete detailed tasks on schedule.

C. **Materials and Supplies**
   1. Office stationary
   2. Telephone
   3. Mailing lists

D. **Required Knowledge**
   1. Experience/know how to conduct property tours.
   2. Know own agency staff and know other agencies and staff which will coop in the sale of listed property.

E. Attitudes

1. Willingness to cooperate with other agencies and fellow agents in order to effect a sale in short a time as possible.

IV. Notify Other Offices

A. Steps

1. Develop list of active brokers willing to cooperate with your agency.
2. Fully utilize in house MLS terminals to accomplish this goal.
3. Design attractive and informative fliers and distribute to agencies willing to cooperate in the sale of your listings.

B. Standards

1. Dutifully perform

C. Materials and Supplies

1. Agency stationary
2. Telephone
3. Lists-in house agents and list of other agencies willing to coop
4. Postage
5. Information fliers

D. Required Knowledge

1. Know the agencies which will cooperate with your agency in the sale of your listings.

E. Attitudes

1. Willingness to cooperate with other agencies and personnel in order to accomplish the sale of clients property.

V. Canvas Neighborhood

A. Steps

1. Cold call.
2. Call on neighborhood of adjacent properties.
3. Send letters to all neighborhood homeowners.
4. Carefully record and respond to all neighborhood residents expressing interest in purchasing property and carefully record all referrals of possible buyer prospects.

B. Standards

1. Dutifully perform.

C. Materials and Supplies

1. Agency stationary
2. Telephone
3. Maps of streets in neighborhood
4. Names and addresses of neighborhood property owners.

D. **Required Knowledge**
   1. Fully informed concerning neighborhood composition.
   2. Know existence of and officers and members of civic clubs, etc.

E. **Attitudes**
   1. Willingness to accomplish tasks detailed.

VI. Conduct Open House

A. **Steps**
   1. Plan and schedule time and date.
   2. Advise owner to remove valuables and request owner to be absent during showing.
   3. Confirm liability insurance coverage.
   4. Mail invitations.
   5. Prepare information fliers.
   6. Conduct open house.
   7. Register all visitors.
   8. Close and secure premises after showing.
   9. Write letter of thanks to owner and register names of prospects.
   10. Follow-up registration list by telephoning each registrant trying to promote continued interest in clients property.

B. **Standards**
   1. Accomplish all tasks in a timely fashion.

C. **Materials and Supplies**
   1. Registration book
   2. Telephone
   3. Invitations
   4. Property information fliers
   5. Keys to property

D. **Required Knowledge**
   1. Know how to properly show real property.
   2. Know how to keep accurate records.
   3. Know how to follow-up leads and pursue same to eventual sale.

E. **Attitudes**
   1. Friendliness
   2. Attention to detail and willingness to actively pursue leads gained from open house showings.

VII. Prepare Visual Aids

A. **Steps**
   1. Chart costs/advantages/disadvantages of alternative financing methods.
   2. Compose advertising flier for listed properties.
   3. Prepare marketing visuals detailing subject property in relation to schools, churches, hospitals, shopping centers, etc.

B. **Standards**
   1. When useful and where appropriate complete steps 1, 2, and 3.

C. **Materials and Supplies**
   1. Maps
   2. Transparent overlays
   3. Maps of subject area

D. **Required Knowledge**
   1. Know location of area churches, schools, hospitals, etc.
   2. Know how to prepare transparencies and compose advertising copy.
   3. Know how to prepare charts and graphs to illustrate numerical data.

E. **Attitudes**
   1. Professional attention to detail and desire to present numerical data in graphic form so that clients may see data in a more understandable form.

VIII. **Cultivate Professional Contacts**

A. **Steps**
   1. Solicit assistance of area attorneys, ministers, financial institution officers, and employees, civic club members, country club members, company personnel, office managers, postmen, grocery store personnel, etc. as sources for referrals of people/clients moving into or out of area.
   2. Join Rotary, Optimist, P.T.A. clubs.
   3. Become active member of local board of realtors, etc.
   4. Support and participate in community activities such as Boy/Girl Scouts, Little League Baseball, Health Runs, etc.

B. **Standards**
   1. Participate in as many of the community/professional activities as possible without sacrificing personal health and without sacrificing the stability of personal family relationships.

C. **Materials and Supplies**
   1. Money for dues

D. **Required Knowledge**
   1. Know how and ability to relate in a productive manner with a variety of people.

E. **Attitudes**
   1. Friendliness
   2. Cooperativeness
   3. A helpful and contributing spirit and nature.

CATEGORY C: SELL REAL PROPERTY

I. Find Buyers

A. Steps

1. Determine if there are any prospective buyers who saw the property before it was listed.
2. Respond dutifully and timely to all responses from ad work.
3. Contact all adjacent property owners and ask if they know anyone that would be interested in purchasing property.
4. Distribute advertising fliers to local banks, civic clubs, etc.
5. Present property to all brokers willing to cooperate in the sale of subject property.

B. Standards

1. Dutifully perform steps 1-5 inclusively.

C. Materials and Supplies

1. Telephone
2. Advertising fliers for subject property
3. Automobile
4. Pens, pencils, and record keeping materials

D. Required Knowledge

1. Know brokers in area that will cooperate in the sale of your listings.
2. Know how to work a farm area asking adjacent property owners if they know anyone that they would like to have as a neighbor through purchase of client's property.

E. Attitudes

1. A spirit willing to devote time and effort to the marketing function.
2. Willingness to exert continued effort until a buyer is located for client's property.

II. Assess Buyers' Needs

A. Steps

1. Obtain financial and background information (e.g. credit rating eligibility for various types of financing) to determine prospective buyer's approximate price range.
2. Identify properties that meet the specifications of client.
3. Qualify prospective buyer's according to their income.
4. Determine which financing method would best serve client based upon financial condition of client, family make-up, etc.

B. Standards

1. Conduct these activities for each client.

C. **Materials and Supplies**
   1. Current information from mortgage finance companies regarding availability and cost of loans.
   2. Completed calculations of clients ability to secure financing.

D. **Required Knowledge**
   1. Know how to qualify clients based on industry standards and financial formulas furnished by V.A., F.H.A., and conventional lenders.
   2. Know how to help clients find property which will best suit their family composition.

E. **Attitudes**
   1. Ability to work diplomatically with potential purchasers.
   2. Friendly and helpful attitude which demonstrates a sincere desire to help client find the best suited property for his needs and within the constraints of his income.

III. Show Property

A. **Steps**
   1. Arrange for lock box on property if applicable.
   2. Schedule time for showing and secure property owners agreement at least one day in advance.
   3. Arrange for property owner to absent himself during showing.
   4. Be thoroughly familiar with all amenities/uses of property and emphasize these attributes during showing.
   5. Build fire in fireplace, turn on lights, have soft music in background, have all family pets restrained and out of premises so as to place property in best possible setting.
   6. Let buyer take their time and "sell themselves on subject property insofar as possible."
   7. Explain all amenities which might not be readily apparent to client and detail attractive features such as extra insulation, good traffic flow patterns in design of property, etc.
   8. Carefully explain any seller supplied incentives which could expedite sale such as allowances for redecoration, rug replacement, etc.

B. **Standards**
   1. Dutifully perform steps 1-8 where and whenever applicable.

C. **Materials and Supplies**
   1. Floor plan of house showing room dimensions and construction specifications if possible.
   2. Flashlight
   3. Automobile for transporting clients to clients property.
   4. Key to clients property.

D. **Required Knowledge**

5. Familiarity with subject property through prior inspection.
6. Know how to conduct a proper showing of clients property.
3. Training in sales techniques which will expedite sale.

E. **Attitudes**

7. A positive and friendly attitude.
8. A demonstrated intent to match the needs of client to the property which is being shown and not just show any and all properties.

IV. Write Earnest Money Contracts

A. **Steps**

1. Use appropriate promulgated forms where applicable.
2. Exercise extreme care in filling in blanks and check correctness of data several times.
3. Make sure that entries comply with the instructions of client.
4. Use an attorney if the promulgated forms (where applicable) are insufficient to properly accomplish the requirements of the client.
5. Advise client that the earnest money agreement is a legal and binding contract and that they should obtain the services of a licensed attorney if they do not fully understand the agreement.

B. **Standards**

1. Completely fill in the blanks of promulgated forms (where applicable) with 100% accuracy, and with full compliance with the stated instructions of the client regarding price, terms, dates, for performance, etc.

C. **Materials and Supplies**

1. Copies of all promulgated forms (where applicable.)
2. Extra copies of forms for all parties who sign purchase agreement.
3. Pen and corporate seal, if required.

D. **Required Knowledge**

1. Training and experience in completing purchase agreements.
2. Ability to choose correct promulgated forms (where applicible).
3. Ability to recognize when promulgated forms do not satisfy the requirements of the deal.
4. Ability to recognize when clients do not understand the earnest money contract and awareness that the fiduciary relationship requires you to advise the client to secure the services of a licensed attorney before the agreement is executed.

E. **Attitudes**

1. A professional attitude and a willingness to devote extreme care in the completion of the purchase agreement.
2. Desire to protect a clients interest by making sure that they understand fully the terms and conditions of the agreement.

V. **Negotiate Contracts**

A. **Steps**

1. Timely and dutifully transmit all offers and counter-offers to your client.
2. Advise your client (seller) as to pricing parameters which might be acceptable, relating same to market value of subject property.
3. Advise seller how to price property in relationship with the desirability of terms and conditions offered by the purchaser.

B. **Standards**

1. 100% honesty and candor with seller and buyer.
2. Observe legal requirements/constraints of the fiduciary/agency relationship at all times.
3. At all times represent the best interests of your client and properly and timely advise all parties to the transaction as to which party you represent.

C. **Materials and Supplies**

1. Same as materials required in step 4 detailed above.

D. **Required Knowledge**

1. Know how to complete promulgated forms.
2. Understand the fiduciary/agency relationship.

E. **Attitudes**

1. Same as attitudes required in step 4 detailed above.

VI. **Open Title**

A. **Steps**

1. Select title company and suggest same to client for approval or use title company which buyer and/or seller selects.
2. Obtain GF (General File) number from title company.
3. Transmit all pertinent contracts and completed forms/agreements to title company.
4. Deposit earnest money with title company and obtain receipt.

B. **Standards**
   1. Properly deliver and account for monies escrowed with title company.
   2. Deliver timely all legal documents to title company which your client has executed. (Deliver all papers on day of execution if at all possible but at least no later than next business day following execution.

C. **Materials and Supplies**
   1. Executed contracts
   2. Record keeping books
   3. Automobile which can be used to deliver contracts, etc. to title company.

D. **Required Knowledge**
   1. Training and knowledge of fiduciary responsibilities regarding the handling of escrow/earnest money deposits, etc.
   2. Know local title companies and their officers.
   3. Know proper costs associated with processing of title.

E. **Attitudes**
   1. Strict compliance with law concerning the handling of earnest monies.
   2. A willingness to protect clients interest at all times.

VII. Arrange Financing

A. **Steps**
   1. Investigate finance sources such as: institutional (e.g., savings and loans, thrift companies, mortgage brokers.)
   2. Investigate financing sources such as: Private (e.g., pension, funds, collateralized, carry-back) loans.
   3. Determine availability of mortgage money from lenders offering loans secured by government agencies such as V.A., F.H.A., Veterans Land Loan agencies, etc.
   4. Investigate long term lease possibilities.
   5. Investigate sale-leaseback possibilities.
   6. Investigate owner financing possibilities through such vehicles as installment loan purchase agreement.

B. **Standards**
   1. Investigate loan sources and keep abreast of changes in availability of and cost of mortgage monies.
   2. Advise client as to which loan source will best serve their interests.

C. **Materials and Supplies**
   1. Current information from mortgage brokers/lenders concerning availability and cost of mortgage money.
   2. Telephone

D. **Required Knowledge**
   1. Understanding of mortgage loan procedures and experience in negotiating mortgage loans with brokers and finance company officers and employees.

E. **Attitudes**
   1. Professional attention to detail and willingness to investigate several different sources to get best deal for your client.
   2. Willingness to do homework and keep abreast of rapidly changing events in the mortgage finance market.

VIII. Arrange for Inspections and Repairs

A. **Steps**
   1. Obtain list of licensed real estate inspectors.
   2. Build list of professional carpenters, plumbers, etc. and document their experience and work history with testimony of past customers who were satisfied with quality of their work.
   3. Submit lists of number one and number two (above) to client and request them to select the mechanic/artisan who is to do the necessary inspections and/or repairs to subject property.

B. **Standards**
   1. Select only licensed professionals who can document their work history.
   2. Determine that all mechanics/artisans have professional liability insurance and that they are covered by workmens comprehensive insurance.

C. **Materials and Supplies**
   1. List of licensed mechanics/artisans who do work in your area.
   2. Telephone
   3. Proper legal documents such as release forms, employment contracts, etc.

D. **Required Knowledge**
   1. Know the labor market in your area.
   2. Know the work history of all contractors you employ.
   3. Know how to properly obtain executed legal documents such as release of liability forms, etc.

E. **Attitudes**
   1. Professional attitude which causes the selection of contractors based on documented work histories and not upon personal like or dislike of the worker.

IX. Schedule Closing/Funding

A. Steps

1. Obtain information from title closer which would indicate possible times for closing.
2. Coordinate closing date/time with seller.
3. Coordinate closing date/time with purchasers broker and/or agent.
4. Obtain information from title company representative as to when the mortgagee will fund the deal and advise your client of same.
5. Protect your professional interests by advising seller in writing as to when he will actually receive his money from the sale.

B. Standards

1. Perform above tasks for each closing.

C. Materials and Supplies

1. Telephone
2. Office stationary and envelopes
3. Property file

D. Required Knowledge

E. Attitudes

1. Professional attitude which causes the selection of contractors based upon documented work histories and not upon personal like or dislike of the a person.

CATEGORY D: APPRAISE PROPERTY

I. Determine Type/Purpose/Location of Appraisal

A. Steps

1. Type:
   a. Long form narrative
   b. Short form (promulgated form)
   c. Letter report
   d. Oral report
2. Purpose:
   a. Determine highest and best use of property.
   b. Determine value mineral rights.
   c. Determine salvage value of property.
   d. Determine value as of a past date.
   e. Determine value of easement to be taken by eminent domain.
   f. Determine value subsequent to/after partitioning.
   g. Determine leasehold value.
   h. Determine Fair Market Value.
   i. Determine value of life estate interest.
   j. Etc.

3. Location of Appraisal
   a. Legal description of property.
   b. Common reference such as street address, the Jones place, etc.
   c. City, county, state where subject property is located.
   d. Rectangular survey description (where applicable).

B. Standards

1. Complete above tasks accurately and completely for each appraisal.

C. Materials and Supplies

1. Maps
2. Compass
3. Standard appraisal forms (where applicable)
4. Notebooks, pens, pencils
5. Camera
6. Measuring tapes

D. Required Knowledge

1. Know how to collect pertinent data for appraisal.
2. Know how to take property measurements.
3. Know how to properly interview people to obtain necessary data.
4. Know how to use the rectangular survey system.
5. Know the different types of appraisals and what information is required to be included in each type.
6. Know how to properly write the narrative part of an appraisal.
7. Know how to properly display/enter numerical and statistical information in the appraisal.
8. Know how to exclude spurious and unimportant information from the appraisal report.
9. Know all the major functions which an appraisal may serve and properly detail the purpose of the appraisal in a report.
10. Know how to use a meates and bounds property description and know how to properly interpret a Lot/Block/Addition property description in a platted subdivision.

E. Attitudes

1. Extremely important that the appraiser be sensitive to the collection of complete and accurate data.
2. Be detail oriented and willing to invest time and energy into the searching of public records.
3. Be willing to exert the physical energy necessary to determine that the property boundaries are correct and that there are no known encroachments which will affect the marketability and/or value of the property.
4. Be willing to stand by ones own interpretations of the facts and not be swayed by input or requests from the property owner concerning value.

II. **Negotiate Fee**

A. **Steps**
1. Determine hours of time needed to complete appraisal.
2. Determine amount of out of pocket expenses associated with preparation of the appraisal.
3. Research and determine the cost of office personnel time and materials which should be charged against the appraisal.
4. Determine costs of visuals and special graphics.
5. Determine cost of binding appraisal and number of completed reports required.
6. Add all costs and apply a percentage of the cost for profit.
7. Submit final cost estimate to client ordering the appraisal and gain approval in writing of the price.
8. Write acceptance letter to client and thank him for the order.

B. **Standards**
1. Complete steps 1-8 carefully and completely for every appraisal request.

C. **Materials and Supplies**
1. Typewriter
2. Office stationary and envelopes

D. **Required Knowledge**
1. Know how much time it takes to complete the type of appraisal requested.
2. Know, from experience, how much out of pocket expenses will be expended to research and write an accurate appraisal.
3. Know from thorough study the cost of your office personnel and be able to correctly estimate the cost of the office personnel contribution.

E. **Attitudes**
1. Be willing to compute accurately the costs associated with the production of an appraisal and be realistic with cost information.
2. Never make an estimate for the cost of an appraisal based on "gut feeling" or unsubstantiated cost estimates.

III. **Inspect Subject**

A. **Steps**
1. Determine highest and best use of property.
2. Determine structural soundness of building (physical deterioration.)
3. Determine whether the building/property is economically obsolete.

4. Determine all physical and/or environmental factors which contribute to the value of the property such as: Change in the neighborhood structure (i.e. regression/progression phase of cycle.)
5. Apply/observe also called "principles of value":
   a. Supply and demand
   b. Regression/Progression of subject property by considering adjacent properties.
   c. Contribution
   d. Conformity
   e. Highest and best use
   f. Competition
   g. Increasing/Diminishing returns
   h. Etc.
6. Examine property for adequacy of ingress/egress.
7. Examine property for drainage problems and for sewer capacity.
8. Make sure that utilities to subject property are adequate.
9. Determine flood plane of property.
10. Determine if subsidence is a problem to subject area and subject property.
11. Determine quality of air in area and note and potential pollutant sources such as chemical plants, etc.
12. Determine operating expenses for improved properties.
13. Determine tax costs associated with ownership of the property.
14. Determine sufficiency of insulation (where applicable.)
15. Determine whether or not building permits would be issued for any proposed improvement to the property.
16. Determine if there are any apparent violations of deed restrictions and/or zoning regulations in the neighborhood which would affect value of the property.
17. Determine if the topography (and sub soil composition) of the property is suitable for its current use and for any projected improvements to the property.
18. Make sure that there are no apparent encroachments on the property.
19. Check to see that there are no adverse holders in possession of the property.
20. Determine that all property lines are correct and in compliance with dimensions cited on the survey.

B. Standards

1. Complete the above steps for each appraisal.

C. Materials and Supplies

1. Measuring tapes
2. Camera

3. Notebooks to record observed information/data.
4. Automobile for transport to and from subject property.

D. Required Knowledge

1. Know how to properly conduct a property inspection and have specialized knowledge as to how to apply and interpret this information to an appraisal.

E. Attitudes

1. Be willing to devote time to inspection of the property.
2. Be willing to record, check, and re check collected information so that the appraisal will be supported by an accurate and reliable date.

IV. Analyze Data

A. Steps

1. Normalize income stream.
2. Search for anomalies and unusual entries regarding status of property.
3. Breakdown entries concerning deterioration (i.e. curable/incurable.)
4. Breakdown entries relating to obsolescence (i.e. curable/incurable) and as to whether economic or functional.
5. Allow for accrued depreciation.
6. Review data concerning site analysis, neighborhood analysis and regional analysis.
7. Apply comparative unit costs and ratios.
8. Analyze operating costs.
9. Analyze tax, security, maintenance, utilities, insurance costs.
10. Apply cost approach, Market Data approach, income approach to obtain indicated value of property.

B. Standards

1. Attention to detail and accuracy.

C. Materials and Supplies

1. Automobile
2. Telephone
3. Measuring Tape
4. Camera

D. Required Knowledge

1. Formal training in appraisal techniques.

E. Attitudes

1. Professional attitude with attention to detail and accuracy.

V. Reconcile Data

A. Steps

1. Review the reliability of data used.
2. Review the relative applicability of the approach to the type of property being appraised.

3. After analyzing the data and obtaining indications of the value by the appropriate approach or approaches, reconcile the value indications into a final conclusion of the defined value.

B. Standards

1. Apply the three steps detailed above to each appraisal.

C. Materials and Supplies

1. Information from step 4, numbers 1-10 inclusive detailed above.

D. Required Knowledge

1. Formal training and knowledge gained from appraisal courses sufficient to permit the proper application of numbers 1-10 detailed above into a final correlation of indicated value.

E. Attitudes

1. Professional attention to detail.
2. Willingness to honestly apply the statistical information into a final correlated indication of value.

VI. Prepare Appraisal Report

A. Steps

1. Use a good grade of paper, cover and binding.
2. Type the report.
3. State qualifying and limiting conditions and underlying assumptions.
4. Enter legal description of the property, its condition, and environment.
5. Detail all pertinent facts.
6. Enter statement regarding reconciliation of value indication.
7. Compose title page.
8. Compose transmittal letter.
9. Compose table of contents.
10. Summarize facts and important conclusions.
11. Indicate objective of the appraisal, and definition of value.
12. Identify the property, legal description, and underlying assumptions.
13. Indicate property rights appraised and date that valuation applies.
14. Detail city data, neighborhood and location data, and trends observed.
15. Indicate land or site date, zoning, utilities and taxes.
16. Detail description of improvements.
17. Make a statement as to the best use of the property.
18. Enter statement concerning indication of value by: the cost approach, the Market Data approach and the Income approach.

19. Enter statement concerning the reconciliation of value indications and conclusions of value.
20. Enter statement of qualifying and limiting conditions.
21. Enter statement indicating certification of value if not combined with letter of transmittal.
22. Enter statement detailing the qualifications of the appraiser.
23. Prepare a section which would contain maps, plats and photographs of the subject property.

B. **Standards**
1. All steps detailed should be completed for every long form narrative appraisal.

C. **Materials and Supplies**
1. Typewriter
2. Binding materials
3. Good quality stationary

D. **Required Knowledge**
1. Formal training in appraisal course which included instruction concerning how to write formal narrative appraisals.

E. **Attitudes**
1. Perseverance, and care concerning neatness, and attention to the use of good grammer, in the appraisal report.

VII. **Present Appraisal**

A. **Steps**
1. Present personally if possible, alternatively deliver via registered and/or certified United States mail.

B. **Standards**
1. Formal delivery whenever possible.

C. **Materials and Supplies**
1. Completed appraisal report

D. **Required Knowledge**
1. Competence which would make the appraisal report complete and accurate.

E. **Attitudes**
1. A pleasant friendly business like approach.

CATEGORY E: DISCOVER NEW PROSPECTS

I. **Join Service/Community Organizations**

A. **Steps**
1. Rotary, Optimist, Kiwanis, etc./local civic clubs, community chests, local historical society, etc.

B. **Standards**
1. Should be effective whenever possible.

C. **Materials and Supplies**
   1. Money for dues
   2. Time to actively support and contribute to groups with which you choose to affiliate.

D. **Required Knowledge**
   1. Compile list of service and community organizations in the area.

E. **Attitudes**
   1. Professional approach and willingness to contribute to local service and community organizations.

II. **Cultivate Key Contacts for Referrals**

A. **Steps**
   1. Subscribe to and join referral services.
   2. Compose and send letters to other brokers with whom you could refer clients and receive same in return.
   3. Cultivate key persons in the community such as minsters, bank officers, local grocery store employees, and all parties that would be aware of people moving into or out of the community.

B. **Standards**
   1. Contribute a fair portion of time in this endeavor.

C. **Materials and Supplies**
   1. Telephone book
   2. Records for keeping information concerning possible referral contacts.
   3. Automobile

D. **Required Knowledge**--See Category F above.

E. **Attitudes**--See Category F above.

III. **Contact FSB Owners**

A. **Steps**
   1. Establish routine schedule for discovery of FSB owners signs in your farm area.
   2. Telephone FSBO owners and make appointment.
   3. Write thank you letters to FSBO owners.

B. **Standards**
   1. Necessary activity which must be completed on a weekly basis.

C. **Materials and Supplies**
   1. Automobile
   2. Record keeping books
   3. Crisscross directory
   4. Office stationary

D. **Required Knowledge**
   1. Formal training concerning the proper operation of a sales territory/farm area.

E. **Attitudes**
   1. Willingness to conduct this activity on a weekly basis.

IV. **Make Cold Calls**

A. **Steps**
   1. Schedule approximately 5 to 10% of your sales activity for this purpose.
   2. Make this a weekly if not daily part of your sales routine.

B. **Standards**
   1. Conduct these activities on a scheduled basis regardless whether business is good or bad.

C. **Materials and Supplies**
   1. Crisscross directory
   2. Key maps of your farm area
   3. Automobile
   4. Telephone

D. **Required Knowledge**
   1. Know how to properly work your farm area

E. **Attitudes**
   1. Must realize that one listing out of 15 to 20 attempts is normal and the one listing indicates success.

V. **Work Farm Areas:** This includes all activities detailed steps I, II, III, IV, VI, VII, and VIII, and should be performed in an area where there are at least two to three hundred houses and in an area where one house in five will sell each year.

VI. **Contact Expired Listings**

A. **Steps**
   1. These activities must be performed on a continuing basis.

B. **Standards**
   1. Activities should be performed weekly, if possible.

C. **Materials and Supplies**
   1. Typewriter
   2. Office stationary
   3. Newspaper contacts
   4. Postage
   5. A budget which allocates money for these activities.

D. **Attitudes**
   1. Professional attention to these activities and a realization that this is an important function of the sales process and must continue whether business is good or bad.

VII. **Write Newsletters:** See step VI "Contact Expired Listings"

VIII. Send Mass Mailouts: See step VI "Contact Expired Listings"

CATEGORY F: SCHEDULE ACTIVITIES--See Sales Agent DACUM Category E "Manage Office".

CATEGORY G: CONTINUE EDUCATION

I. Attend Meetings/Seminars

A. Steps
1. Take courses related to real estate education and read periodicals and journals appropriate to specialized areas of interest within the real estate field.

B. Standards
1. Conduct on regular and continuing basis.

C. Materials and Supplies
1. Real estate journals, periodicals, special new letters, etc.

D. Required Knowledge
1. Formal training experience which would permit one to understand technical information relating to the real estate industry.

E. Attitudes
1. Understanding that this function is important to success in real estate career.

II. Take Courses: See step I "Attend Meetings/Seminars"

III. Read Periodicals: See step I "Attend Meetings/Seminars"

IV. Learn OJT/From Experience: See step I "Attend Meetings/ Seminars

CATEGORY H: REFER RELOCATION PROSPECTS: Steps 1-5 in this category are detailed in CATEGORY F "DISCOVER NEW PROSPECTS" step II.

CATEGORY I: KEEP PERSONAL/BUSINESS RECORDS

I. Consult CPA

A. Steps
1. Consult CPA
2. Record receipts of income
3. Maintain vehicle records
4. Record income and expenses
5. Analyze tax liability

B. Standards
1. Conduct these activities on a continuing basis.

C. Materials and Supplies
1. Ledger books appropriate to the recording on subject information.

D. **Required Knowledge**
   1. Location of competent accountants, lawyers, etc.

E. **Attitudes**
   1. Professional attitude and attention to detail.

II. **Record Receipts:** See step I "Consult CPA"

III. **Maintain Vehicle Records:** See step I "Consult CPA"

IV. **Record Income/Expenses:** See step I "Consult CPA"

V. **Analyze Tax Liability:** See step I "Consult CPA"

Reference: Job Analysis and Testing Procedures Study, conducted for the California Department of Real Estate by Educational Testing Services.

Real Estate Agent
Program

Task/Course Identification

Task/Course Identification

Program

Real Estate Agent

Task/Competency	COM Course Title	Real Estate 131 (Principles)	Business Math 131	Computer Science 133	Introduction to Business 131	Speech 131	Business Communications 231	Business Psychology 231	Real Estate 132 (R.E. Law)	Real Estate 231 (R.E. Appraisal)	Real Estate 235 (R.E. Investment)	Real Estate 232 (R.E. Finance)	Real Estate 234 (R.E. Prop Mgmt.)	Cooperative Education 241
Collect Basic Data On Subject	✓							✓	✓	✓	✓	✓	✓	
Collect Data On Comparables								✓		✓	✓	✓	✓	
Analyze Data	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓	✓	
Determine Market Value	✓							✓	✓	✓	✓	✓	✓	
Obtain Listing	✓	✓	✓	✓			✓	✓	✓	✓	✓			
Collect Specific Data	✓	✓	✓	✓								✓		
Process Listing	✓													
Service Listing	✓										✓			
Plan Advertising Strategy	✓										✓	✓		
Write Ad	✓										✓	✓		
Arrange Agent Tours	✓													
Notify Other Offices	✓								✓	✓				
Canvas Neighborhood	✓										✓	✓		
Conduct Open House	✓											✓		
Prepare Visual Aids	✓								✓	✓	✓	✓	✓	
Cultivate Professional Contacts	✓					✓	✓	✓	✓	✓	✓	✓	✓	
Find Buyers	✓									✓				
Assess Buyers' Needs	✓						✓			✓	✓	✓	✓	
Show Property	✓									✓		✓	✓	
Write Earnest Money Contracts	✓							✓		✓			✓	
Negotiate Contracts	✓							✓		✓	✓	✓	✓	
Open Title	✓									✓			✓	
Arrange Financing	✓									✓	✓			
Arrange For Inspections/Repairs	✓								✓	✓	✓	✓	✓	
Schedule Closing/Funding	✓									✓				
Secure Owner's Agreement	✓									✓		✓	✓	
Maintain Records	✓							✓	✓	✓	✓	✓	✓	
Delegate Maintenance	✓									✓		✓	✓	
Promote and Show Property	✓				✓	✓				✓		✓	✓	
Assess Client's Needs	✓									✓	✓	✓	✓	
Process/Negotiate Transaction	✓				✓	✓		✓		✓	✓	✓	✓	
Determine Type/Purpose/Location of Appraisal	✓								✓					
Negotiate Fee	✓								✓	✓		✓	✓	
Inspect Subject	✓							✓	✓	✓	✓	✓	✓	
Analyze Data	✓	✓	✓	✓				✓	✓	✓	✓	✓	✓	
Reconcile Data	✓								✓					
Prepare Appraisal Report	✓								✓					
Present Appraisal	✓								✓					
Join Service/Community Organizations	✓											✓	✓	
Cultivate Key Contacts for Referrals	✓								✓	✓	✓	✓	✓	
Contact FSB Owners	✓									✓				
Make Cold Calls	✓				✓								✓	
Work Farm Areas	✓										✓	✓	✓	
Contact Expired Listings	✓												✓	
Write Newsletters	✓					✓					✓	✓	✓	
Send Mass Mailouts	✓										✓	✓	✓	
Manage Floor Time	✓											✓	✓	
Schedule Showings	✓										✓		✓	
Schedule Listings	✓													
Schedule Meetings	✓								✓	✓	✓	✓	✓	

(Over Please)

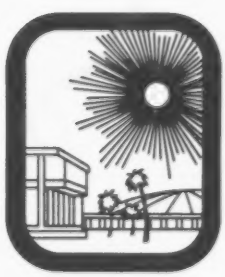
Program

Real Estate Agent

Task/Course Identification

Task/Competency	COM Course Title	Real Estate 131 (Principles)	Business Math 131	Computer Science 131	Introduction to Business 131	Speech 131	Business Communications 231	Business Psychology 231	Real Estate 132 (R.E. Law)	Real Estate 231 (R.E. Appraisal)	Real Estate 235 (R.E. Investment)	Real Estate 232 (R.E. Finance)	Real Estate 234 (R.E. Prop. Mgmt.)	Cooperative Education 241
Schedule Presentations	✓							✓	✓	✓	✓	✓		
Schedule Required Inspections/Surveys	✓								✓	✓	✓			
Schedule Closings	✓								✓	✓				
Coordinate Miscellaneous Errands	✓										✓			
Attend Meetings/Seminars	✓							✓	✓	✓	✓	✓		
Take Courses	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Read Periodicals	✓							✓	✓	✓	✓	✓		
Learn OJT/From Experience													✓	
Join Relocation Service												✓		
Contact Destination Agent	✓											✓		
Negotiate Referral Fee	✓											✓		
Inform Prospect of Referral												✓		
Verify/Follow Up Results	✓								✓	✓	✓	✓	✓	
Consult CPA	✓								✓	✓	✓	✓		
Record Receipts										✓	✓	✓	✓	
Maintain Vehicle Records												✓	✓	
Record Income/Expenses	✓								✓	✓	✓	✓	✓	
Analyze Tax Liability	✓	✓		✓					✓	✓	✓	✓		

REAL ESTATE BROKER
DACUM CHART



College of the Mainland
Division of Business
March 4, 1988

Real Estate Broker

REAL ESTATE BROKER JOB DESCRIPTION-Sells real estate, rents and manages property, makes appraisals, arranges for loans and holds a license for such.

DUTIES		Task Statements								
A	Evaluate Market	Research Economic Conditions A1	Identify Specific Target Markets A2	Identify Clientele A3	Research Financial Markets A4	Research Data Sources A5	Evaluate Competition A6			
B	Promote Positive Image	Establish and Maintain Integrity B1	Market Specific Services B2	Promote Name Recognition/Logo B3	Participate in Community Affairs B4	Maintain Attractive Premises B5				
C	Maintain Business Plan	Analyze Financial Condition C1	Establish Goals C2	Define Sources of Income/Expenses C3	Prepare Budget C4	Monitor Financial Status C5	Utilize Professional Services: Insurance, Legal & Accounting C6			
D	Manage Sales Personnel	Recruit Personnel D1	Develop In-House Training D2	Establish Farm Areas D3	Plan Productive Sales Meetings D4	Implement Productive Sales Meetings D5	Review/Evaluate Agents' Activities D6	Observe/Counsel Personal Problems D7	Monitor All Legal Documents D8	Encourage Personnel Input (Internal & External) D9
E	Manage Office	Establish Office Policy/Procedure E1	Delegate Responsibility E2	Seek New Markets E3	Create/Monitor Advertising E4	Review Profit and Loss E5	Maintain Physical Plant E6			
F	Continue Education	Read Daily News & Trade Publications F1	Review Legal Updates F2	Attend Seminars & Board Meetings F3	Teach Stress Management F4	Observe & Verify Comprehension of Job Duties F5	Evaluate & Correct Employee Performance F6	Retrain as Needed F7		
G	Produce Income	List & Sell Property G1	Appraise Property G2	Manage Rental Property G3	Manage REO'S G4	Lease Property G5	Refer Clients G6	Consult For Fees G7	Broker Loans G8	

KNOWLEDGE & SKILLS

Listening
Selling
Appraising
Negotiating
Geographic Knowledge
Math
Computations
Communication
Computer

TOOLS & EQUIPMENT

12C Calculator
Transportation (license, duties, fees)
Telephones
Beepers
Tape
Camera
Office Equipment/Supplies
Maps
Data Sources
Word Processor
Typewriters
Yard Signs
Lock Boxes

BEHAVIOR & ATTITUDES

Ethics
Honesty
Cooperation
Courteous
Self-esteem
Self-motivated
Encourage Participation
Being Responsible
Good Work Habits
Dress Professionally
Dependable
Persistent
Pleasant
Tolerant
Patient

FUTURE TRENDS

Market on upswing
Residential bottomed out with gradual increase
Rice Study (HSMA)-Prices will rise 25%
Moderate increase in pricing
Uprise on commercial property (Naval base, dog track, Sterling)
Commercial 18 months behind residential
Tax consequences on commercial due to tax law
Industrial and commercial expansion key issue
NASA growth area
Galveston County potential for agriculture and industrial (water ways, railroad, marinas)
Slow, steady growth
Diversification & Specialization
Tighter financing
Stricter underwriting guidelines

REAL ESTATE BROKER PANEL

Faye Hoover - Faye Hoover Real Estate
David Norris - Steward Title
Mike Kuchta - Action Realty
Yvonne Chatelain - Century 21 Sunrise Realty
Dave Buchwald - Dave Buchwald Real Estate
Pete O. Zamora - Smith Raines Company
Rick Wilkenfeld - The Wilkenfeld Company
Charley Outterside - Outterside & Nunn Realty

FACILITATORS

Maryann Pringle
Joyce White

Real Estate Broker Program Profile

REAL ESTATE BROKERS

CATEGORY A: EVALUATE MARKET

I. Research Economic Conditions

A. Steps

1. Read the business section of the area newspaper.
2. Cut out and paste in scrapbook the Sunday newspaper business section which details cost and source of local mortgage monies.
3. Subscribe to and read business magazines and periodicals relating to finance and real estate.
4. Routinely watch evening news cast and other special programs such as Wall Street Review and late evening World News Summaries.

B. Standards

1. Conduct foregoing activities on a daily basis.

C. Materials and Supplies

1. Periodicals, magazines, newspapers, special news reports, and journals relating to finance and real estate.

D. Required Knowledge

1. Training and knowledge of financial markets sufficient enough to extract and relate information presented to the practice of real estate.

E. Attitudes

1. Willingness to conduct research and effort in the collection of data on a continuing basis.

II. Identify Specific Target Markets

A. Steps

1. Identify opportunities for land development.
2. Identify opportunities for residential and commercial use.
3. Investigate possible sale, lease, or exchange of business opportunities within your farm area.
4. Investigate opportunities for sale, lease, or exchange of agricultural land.
5. Investigate possibilities for sale, lease, or exchange of commercial property.
6. Investigate possibilities for sale, lease, or exchange of industrial property.
7. Arrange for sale lease of oil and gas or mineral rights.
8. Investigate opportunities for sale, lease or exchange of mobile homes.
9. Investigate prepaid rental listing service.
10. Investigate opportunities for auctioning of property if legal within your state.

11. Investigate opportunities for sale of probate properties from administrators or executors/executrix of estates.
12. Investigate the possible sale of foreclosed properties from financial institutions.
13. Investigate the possibility of negotiating loans for fee.
14. Investigate opportunities for advising and counseling for fee.

B. Standards

1. Continually investigate opportunities such as those detailed above

C. Materials and Supplies

1. Automobile
2. Telephone
3. Calling cards
4. Office stationary and envelopes

D. Required Knowledge

1. Formal training in real estate.
2. Specialized knowledge concerning areas like business opportunities, marketing, and subdivision development, etc.

E. Attitudes

1. Willingness to exercise imagination and perseverance in investigating all business opportunities within your farm area.

III. Identify Clientele--For more detailed information please refer to Categories B "Market Real Property," C "Sell Real Property," and F "Discover New Prospects" in the Real Estate Agent Job/Task Analysis.

A. Steps (See statement above)

B. Standards

1. Conduct these activities on a continuing basis.

C. Materials and Supplies

1. Telephone
2. Automobile
3. Calling cards
4. Office stationary

D. Required Knowledge

1. Formal training in the marketing process.
2. Ability to identify markets.

E. Attitudes

1. Realization that this is a necessary and on going requirement for the successful operation of a real estate business.

IV. Research Financial Markets

A. Steps

1. Read on an on going basis the Wall Street Journal.

2. Contact local lending sources for quotes concerning cost and availability of mortgage funds.
3. Obtain the Sunday paper business section which details cost and availability of local mortgage funds and post in office.

B. Standards
1. Regular performance of these activities.

C. Materials and Supplies
1. Sunday newspaper
2. Telephone

D. Required Knowledge
1. The ability to understand and apply financial information to the operation of a business.

E. Attitudes
1. Realization that these activities must be conducted on a continuing basis for a business to be successful.

V. Research Data Sources

A. Steps
1. Review MLS data.
2. Review data published by the real estate center.
3. Review material published by local chambers of commerce.
4. Review data published by universities and economic development counsels.
5. Review business periodicals and magazines relating to real estate and finance markets.

B. Standards
1. Regular performance of these activities.

C. Materials and Supplies
1. Journals
2. Periodicals
3. Magazines
4. MLS data
5. Special reports such as real estate center publications.

D. Attitudes
1. Ability to extract information from these sources and apply same to business activities.
2. Willingness to conduct research on a continuing basis.

VI. Evaluate Competition

A. Steps
1. Determine the name, location and ownership of all real estate offices competing within your farm area.
2. Determine the relative strength of the competition (i.e. number of active brokers/salespersons and their relative experience.)

3. On a weekly basis cover your farm area noting the installation of competitors yard signs.
4. On a daily basis check the newspapers, MLS entries, and other publications which would show the listings of competitors.
5. Regularly attend and participate in Board of Realtors functions noting any new personnel hired by competitors.
6. Review newspapers, marketing reports, etc. and note property sales made by competitors.

B. Standards

1. Conduct all noted activities on a regular basis.

C. Materials and Supplies

1. Newspapers
2. Marketing reports
3. MLS reports
4. Board of Realtors membership

D. Required Knowledge

1. Know how to operate a real estate farm.
2. Know sources of information which details competitive marketing activities.

E. Attitudes

1. Friendly competitive spirit.

CATEGORY B: PROMOTE POSITIVE IMAGE

I. Establish and Maintain Integrity

A. Steps

1. Observe and maintain fiduciary responsibilities at all times.
2. Transmit information to clients in a timely manner.
3. Maintain a friendly attitude with clients at all times.
4. Return all telephone calls in a timely fashion.
5. Complete all employment assignments in a competent and professional manner.
6. Protect the company image and goodwill by operating an honest and efficient business.

B. Standards

1. Observe foregoing tasks at all times.

C. Materials and Supplies

1. All those which are necessary to proper operation of a real estate company.

D. Required Knowledge

1. Formal training regarding fiduciary and agency responsibilities.
2. Complete familiarity with and understanding of all rules and regulations which apply to a real estate business such as Real Estate Settlement And Procedures Act, Deceptive Trade Practice Act, fair housing laws, Real Estate License Act, etc.

E. Attitudes

1. Willingness to conduct all business activities in an honest and efficient manner.

II. Market Specific Services--Refer to Category A, "Evaluate Market," II.

III. Promote Name Recognition/Logo

A. Steps

1. Design a proper logo which accurately translates your business activities.
2. Promote name recognition by the use of logo on all stationary, calling cards, yard signs and ad work.

B. Standards

1. Be cognizant of and promote name recognition/logo at all times.

C. Materials and Supplies

1. Stationary with printed company logo.
2. Calling cards with printed company logo.
3. Signs, etc. with printed company logo.

D. Required Knowledge

1. Be aware that the use of logo and (goodwill) name recognition is an important aspect of your marketing effort.

E. Attitudes

1. Understand that the use of logo is important in maintaining a good company image.

IV. Participate in Community Affairs

A. Steps

1. Join local maintenance and community development clubs.
2. Participate in community civic clubs.
3. Participate in voter registration activities.
4. Participate in local church activities.
5. Join and participate in promotion of boy/girl scout activities, local little league baseball, and fund-raising activities such as United Fund, etc.

B. Standards

1. Conduct these activities on a continuing basis.

C. Materials and Supplies

1. Advertising and promotional budget which would allow one to pay membership fees and/or dues.

D. Required Knowledge

1. Familiarity with organizations in the community which promotes the betterment of the community.

E. Attitudes

1. Friendly nature and a willingness to participate and help.

V. **Maintain Attractive Premises**

A. **Steps**
1. Devote particular care to the maintenance of lawn and exterior of the building.
2. Clean windows inside and out on a regular basis.
3. Clean carpet on a regular basis.
4. Maintain comfortable temperature within the premises.
5. Assure that air quality is acceptable.
6. Assure that furnishings are appropriate and that they contribute to a quality business environment.

B. **Standards**
1. These steps should be maintained at all times.

C. **Materials and Supplies**
1. Adequate supply of cleaning supplies and materials (lightbulbs, lawnmowers, paint, aerosol air-fresheners, etc.)

D. **Required Knowledge**
1. Know how to properly maintain of commercial property.

E. **Attitudes**
1. Ability to recognize that maintenance of a clean, high-quality environment in the business place is critical to the functioning of a good business.

CATEGORY C: MAINTAIN BUSINESS PLAN

I. **Analyze Financial Condition**

A. **Steps**
1. Determine cash on hand.
2. Determine and record (on a continuing basis) accounts receivable.
3. Compute all fixed operating expenses such as utilities, office lease, etc.

B. **Standards**
1. Conduct these activities on a weekly basis.

C. **Materials and Supplies**
1. Ledger books
2. Statements for expenses due

D. **Required Knowledge**
1. Training in accounting methods

E. **Attitudes**
1. Attention to detail
2. Realization of the importance of the accounting function to the operation of a successful business.

II. **Establish Goals**

A. **Steps**
1. Determine sales goals/quotas for each sales person based on size and economic opportunity within marketing area.
2. Determine potential for expansion and growth within marketing area.
3. Explore opportunities for expansion and entry into business opportunities which are not currently being exploited.
4. Establish a one year, three year, five year and ten year business plan which contains a statement concerning goals to be achieved within each of these time frames. Coupled with a plan to achieve same.

B. **Standards**
1. Review and adjust (if necessary) one year goal plans/procedures every six months.
2. Review goals of three year plan at least yearly and adjust if necessary.
3. Adjust five year goals when necessary.
4. Review ten year goals and adjust business operations when necessary to achieve goals set forth in this category.

C. **Materials and Supplies**
1. Record keeping materials.

D. **Required Knowledge**
1. Training in business management.
2. Management training which includes courses in business planning.

E. **Attitudes**
1. A business oriented personality.
2. Willingness to keep accurate records.
3. Friendly competitive spirit.
4. Personality which enjoys setting goals and achieving realistic, personal and business growth.

III. **Define Sources of Income/Expenses**

A. **Steps**
1. Review statistical data and record percentage/ratio of income derived from residential sales, commercial sales, business opportunities sales, farm and ranch sales, industrial property sales, etc.
2. Review data concerning expenditures, record percentages/ratios of each category of expense and make sure these ratios are within proper limits for the operation of a successful business.

B. **Standards**
1. Calculate and review each and every month.

C. **Materials and Supplies**
   1. Receipts for expenses
   2. Journals which contain entries of all moneys received by the business.

D. **Required Knowledge**
   1. Business training in accounting.
   2. Business training in management.

E. **Attitudes**
   1. Attention to detail
   2. Willingness to observe and adjust business operations (as necessary) to achieve the goals of the business.

IV. **Prepare Budget**

V. **Monitor Financial Status**

A. **Steps**
   1. Establish a proper accounting procedure.
   2. Establish a system which will assure prompt entry of all financial data.
   3. Establish a system of checks and balances so that several people, not just one, reviews the financial status of the business on a regular basis.
   4. Select and use an accounting firm which is experienced in the type of business which is being operated.
   5. Occasionally employ the services of outside business consultants who will realistically review business operations and make reports to owners/mangers.

B. **Standards**
   1. Conduct activities on a continuing basis.

C. **Materials and Supplies**
   1. Ledger books
   2. CPA firm
   3. Business consulting firm

D. **Required Knowledge**
   1. Formal business training and know how to successfully operate a business.
   2. Ability to operate in a professional manner with CPA's and business management consultant's.

E. **Attitudes**
   1. Realization of the importance of monitoring business operations on a continuing basis.

VI. **Utilize Professional Services: Insurance, Legal, and Accounting**

A. **Steps**
   1. Employ professionals in these areas who are trained and experienced in the operations of a real estate business.

2. Employ firms which are willing to work with you on a personal basis and ones which demonstrate interest in and attention to your business operations.
3. Employ firms which have a respected reputation in their respective fields.

B. Standards

1. Exercise care and employ only those firms which have demonstrated expertise and capability in handling matters relating to the operation, of real estate business.

C. Materials and Supplies

1. Employment contracts.
2. Books and files for entering and keeping reports supplied by these firms.

D. Required Knowledge

1. Formal business training and experience in the operation of a real estate business.

E. Attitudes

1. Professional business like attitude and recognition of the fact that it is necessary to employ professionals who are familiar with the operations of a real estate business.

CATEGORY D: MANAGE SALES PERSONNEL

I. Recruit Personnel

A. Steps

1. Create an open atmosphere so that qualified personnel will feel welcome to inquire about employment opportunities within your firm.
2. Establish a procedure which will stimulate/prompt personnel to seek employment interviews with your company.
3. If applicable, employ the services of professional employment counselors.

B. Standards

1. Considering the relatively high turn-over rate of persons employed in the real estate business this activity should be conducted on a continuing basis.

C. Materials and Supplies

1. List of employment agencies within your area who are familiar with the operations of a real estate firm.

D. Required knowledge

1. Formal training in the operations of a real estate business.
2. Management experience sufficient to permit one to interview and screen candidates for employment.

E. **Attitudes**
   1. Professional business attitude.
   2. Sensitivity to and willingness to devote attention to the screening process so that only candidates who are likely to be successful will be employed by the firm.

II. **Develop In-House Training**

A. **Steps**
   1. Conduct sales meeting on a weekly basis using this opportunity to update agents and fellow brokers on changes in laws, financial markets, and rules and regulations of the real estate commission.
   2. Review commercially produced films, slides, etc. and use them as training aids in sales meetings or special training sessions.
   3. Review training materials developed by the real estate center and use this material in training sessions.

B. **Standards**
   1. Conduct these activities on a continuing basis.

C. **Materials and Supplies**
   1. Pamphlets, periodicals, etc. from the real estate center.
   2. Films and other commercially produced training materials.

D. **Required Knowledge**
   1. Know sources of training materials such as the Real Estate Center and National Association of Realtors.

E. **Attitudes**
   1. Realize the importance of a continuing training program for agents and fellow brokers and that this is a necessary activity for the operation of a successful real estate practice.

III. **Establish Farm Areas**

IV. **Plan Productive Sales Meetings**

A. **Steps**
   1. Schedule meetings on a weekly basis if possible.
   2. Start and finish meetings within one hour time.
   3 Always have up-to-date, relative, and important information to present to your sales staff.
   4. Recognize outstanding performance, present awards, and compliment the completion of any special projects or work at this time.
   5. Conduct sales meetings in a friendly and positive manner which will provide motivation for sales agents and fellow brokers.

B. **Standards**
   1. Conduct on a weekly basis whenever possible.

C. **Materials and Supplies**
   1. Temporary and up-to-date educational materials.
   2. Competent invited speakers when possible.
   3. Meeting room large enough to accommodate sales staff and fellow brokers.
   4. Microphone, podium, overhead projectors, etc. where applicable.

D. **Required Knowledge**
   1. Management training.
   2. Ability to conduct sales/motivational meetings.

E. **Attitudes**
   1. Friendly professional attitude.
   2. Willingness to research literature and keep up to date with changes in the real estate business.
   3. Ability to speak, teach and motivate personnel.

V. **Implement Productive Sales Meetings**--See IV. "Plan Productive Sales Meetings"

VI. **Review/Evaluate Agent's Activities**

A. **Steps**
   1. Collect sales data and evaluate agent's activities/production on a weekly basis.
   2. Conduct a formal employee performance evaluation/interview every six months.

B. **Standards**
   1. Conduct this activity weekly combined with a formal review every six months.

C. **Materials and Supplies**
   1. Data reflecting sales activities of agents.

D. **Required Knowledge**
   1. Formal training in business management.

E. **Attitudes**
   1. Friendly personal attitude.
   2. Ability and willingness to realistically evaluate performance data relating same to the overall operations of the business.

VII. **Observe/Counsel Personal Problems**

A. **Steps**
   1. Note all sudden drops in production and/or sales activities of an agent.
   2. Observe and note any dramatic shifts in attitude of sales agents.
   3. Meet with agents on a confidential one-to-one basis when necessary and (when possible and appropriate) offer to assist personnel in reviewing personal problems which are affecting business performance.

B. **Standards**
   1. Conduct this activity only when necessary and at all times handle personal problems in a private and discreet manner.

C. **Materials and Supplies**
   1. Private office or meeting area where confidential discussions can take place away from the observation of fellow agents.

D. **Required Knowledge**
   1. Formal training in business management.
   2. Experience in personnel management.
   3. Formal training courses in business psychology.

E. **Attitudes**
   1. Friendly attitude.
   2. Ability to keep confidential information.

VIII. **Monitor All Legal Documents**

A. **Steps**
   1. Check all advertising copies to determine that information complies with law and rules and regulations of the Real Estate Commission.
   2. Make sure all documents prepared by sales persons properly advise clients concerning any and all risk factors associated with property (e.g., geological hazards, etc.).
   3. Ensure that all documents prepared by agents properly advise clients regarding zoning, building codes or other land use restrictions which may effect their decision regarding purchase and/or use of the property.
   4. Check documents to ensure that agents have advised clients about taxes, special assessments, reassessments, and/or potential exemptions which may affect property under consideration.
   5. Review all contracts and make sure there is information presented concerning structural and mechanical condition of the property.
   6. Check to determine that closing costs have been accurately calculated.
   7. Review and make sure that information is supplied to clients concerning all government rules and regulations applicable to sale/purchase of the property.
   8. Review all purchase contracts and be sure that receipts have been issued to clients for deposited earnest and/or escrow monies.
   9. Review contracts and make sure that agents have properly handled all offers and counter offers between buyers and sellers.
   10. Be sure that agents have properly drafted documents which explains to clients/sellers all terms and conditions relating to escrow, finance, and transfer of real property.

11. Review contracts and make sure that agents have arranged for proper inspections (e.g., pest control, FHA, VA, appraisal, etc.)
12. Review documents and make sure that clients have been properly advised regarding schedules for closing, funding, etc.
13. Check all contracts for signature acknowledgements and see that clients have been provided with an interpreter in a case where they do not read or understand English.
14. Review all documents relating to escrow and make sure the agent has opened an escrow account. Verify that escrow instructions are consistent with the purchase agreement and that all necessary documentation has been processed and that all necessary documents will be available at closing.
15. Make sure that agents have followed the requirements of the Real Estate Settlement and Procedures Act (RESPA) to ensure that buyers and sellers have knowledge of all settlement costs.

B. Standards

1. Conduct these activities on a continuing basis.

C. Materials and Supplies

1. Legal documents and forms completed by agents.

D. Required Knowledge

1. Formal training in contract law and real estate law and governmental rules and regulations.

E. Attitudes

1. Business-like attitude.
2. Attention to detail.

IX. Encourage Personnel Input (Internal and External)

A. Steps

1. Maintain a suggestion box in the office and encourage agents and fellow brokers to contribute ideas.
2. Establish a friendly open atmosphere and encourage agents to discuss ideas relating to new business opportunities between themselves and with management.
3. Establish a reward system which would encourage personnel to think about and contribute ideas relating to the development of new business opportunities.

B. Standards

1. Conduct this activity on a continuing basis.

C. Materials and Supplies

1. Office suggestion box.
2. Certificates, plagues, etc.

D. Required Knowledge

1. Know how and experience in the operation of a sales/marketing business program.

E. Attitudes

1. Friendly competitive spirit.
2. Attitude which is open and welcomes suggestions from everyone in the business.
3. Management attitude which does not take suggestions or recommendations from other people as a personal challenge to the managers expertise, and/or management ability.

CATEGORY E: MANAGE OFFICE

I. Establish Office Policy/Procedure

A. Step

1. Develop and explain company policy, procedures, and standards to all agents.
2. Establish who is to supervise mangers and sales persons.
3. Determine who within the business is to train staff and check agent's documents for accuracy.
4. Establish policy as to who is to operate branch offices in compliance with law and regulations of the real estate commission.
5. Establish who is to submit all required notifications and reports to the real estate commission and/or other government agencies requiring information from your business operations.
6. Establish who is to maintain and accurately complete ledgers relating to cost account transactions.
7. Establish who is to maintain records of the business and copies of all essential documents.
8. Establish which managing broker is responsible for initialling documents proposed or signed by agents.
9. Develop and maintain a policy and procedure check list for sales persons and brokers working for the firm regarding governmental rules and regulations pertaining to real estate so as to avoid infractions.
10. Establish a procedure for reviewing contracts on a regular basis.
11. Establish instructions and procedures policy and monitor agents performance regarding local, state and federal housing laws.
12. Establish who is to monitor agents concerning ethical and moral operation of the real estate practice.
13. Establish who is responsible within the firm for keeping abreast of and reporting all changes in national, state, or local laws and/or rules and regulations affecting the operation of the business.

14. Establish and record in your policy and procedures manual which managing broker is responsible for keeping abreast of and advising agents about changes in market trends, availability of financing, rates, conditions, etc.
15. Establish in your policy and procedures manual which managing broker is responsible for resolving misunderstandings between sales agents.

B. Standards

1. These activities must be conducted on a continuing basis.

C. Materials and Supplies

1. Ledger books
2. Typewriter
3. Office stationary

D. Required Knowledge

1. Business management experience.
2. Formal training relative to the proper operation of a real estate brokerage company.

E. Attitudes

1. Friendly professional attitude.
2. Care and attention to detail.
3. Understanding of the importance of the management function to the proper functioning of real estate business.

II. Delegate Responsibility

A. Steps

1. Establish who is to be the assistant office manager and establish set policies and procedures as to who is responsible for the operation of the office in the absence of the office manager.
2. Define in carefully explained terms in the policies and procedures manual the exact responsibilities of each agent and/or broker affiliated with the business.

B. Standards

1. Explain and review these activities with all new personnel entering the business.

C. Materials and Supplies

1. Policy and Procedures Manual.

D. Required Knowledge

1. Be familiar with the written office policies and procedures manual.

E. Attitudes

1. Friendly professional attitude.
2. Attention to detail.
3. Willingness to devote time to agents so that they will clearly understand policies and procedures of your business.

III. **Seek New Markets** - See Category A, B, C, D.

IV. **Create/Monitor Advertising**

A. **Steps**
1. Review examples of ads which have proven to be successful in the past.
2. Review advertisements published by competitors.
3. Review texts and publications which give examples of ads pertinent to the real estate business.
4. Adjust advertising copy and when possible incorporate creative art work, logos, etc. in ads.
5. Design ads so that they have a clause, picture, or other outstanding features which will attract immediate attention.
6. Detail sufficient information in ads without over burdening the copy.
7. Create ads which contain some type of stimulus point which would provoke readers to respond to the ad.
8. Keep a record of inquiries so that you can determine which ads are productive and which ones are not.

B. **Standards**
1. Advertising must be conducted on a continuing basis during both good and bad economic times.
2. A portion of your budget should be devoted to promotion of goodwill and name recognition of your business (i.e. institutional advertising).
3. Establish a procedure for comparing the achievement of sales resulting from ad work and compare that with the cost of advertising.

C. **Material and Supplies**
1. Copies of newspapers.
2. Cooperative advertising pamphlets and brochures.
3. Other advertising flyers.

D. **Required Knowledge**
1. Formal training in market/sales promotion/advertising techniques.

E. **Attitudes**
1. Competitive marketing spirit.
2. Understanding of the importance of advertising to the successful operation of a real estate business.

V. **Review Profit and Loss** - See Category C.

VI. **Maintain Physical Plant**

A. **Steps**
1. Create and preserve an attractive and appealing exterior grounds to your building and or office at all times.

2. Create and maintain a warm and attractive interior space.
3. Monitor sanitation and cleanliness of premises at all times including daily maintenance of carpeting, polishing of furniture, emptying of all trash and smoking containers.
4. Care and attention to maintaining the quality of air within the business environment.

B. Standards

1. These activities must be conducted on a daily basis.

C. Materials and Supplies

1. Proper sanitation chemicals.

D. Required Knowledge

1. Training and/or familiarity with the maintenance of real property and office environments.

E. Attitudes

1. Care and attention and desire to maintain pleasant and attractive business environment.

CATEGORY F: CONTINUE EDUCATION

I. Read Daily News and Trade Publications

A. Steps

1. Local newspapers
2. Wall Street Journal
3. Special publications of the Real Estate Center
4. Board of Realtors bulletins
5. The Texas Realtor

B. Standards

1. Review these publications each time they are issued.

C. Materials and Supplies

1. Magazines
2. Newspapers
3. Materials as indicated

D. Required Knowledge

1. Formal training in real estate sufficient enough to understand materials published in real estate trade journals, etc.

E. Attitudes

1. Realization that it is important to keep abreast of changes in the real estate business.

II. Review Legal Updates

A. Steps

1. Review and post all notices coming from the Real Estate Center and the Real Estate Commission.
2. Review and post legal updates as they are issued from the Board of Realtors.
3. Subscribe to and review articles in various legal journals relating to real estate.

B. **Standards**
   1. Conduct these activities on a regular and continuing basis.

C. **Materials and Supplies**
   1. Journals
   2. News sources
   3. Legal updates from the research center
   4. Etc.

D. **Required Knowledge**
   1. Formal training in real estate law.

E. **Attitudes**
   1. Professional attention and sensitivity to changes in law which will effect the operation of a real estate business.

III. **Attend Seminars and Board Meetings**

A. **Steps**
   1. Board of Realtors meetings.
   2. Seminars presented by the Real Estate Center.
   3. Private training sessions by organizations such as title companies, etc.
   4. Special training sessions presented by various colleges and universities.

B. **Standards**
   1. Continue these activities on a regular basis.

C. **Material and Supplies**
   1. Pens
   2. Note-taking materials
   3. Etc.

D. **Required Knowledge**
   1. Formal training in real estate
   2. Ability to apply knowledge gained from training sessions to the operation of a real estate business.

E. **Attitudes**
   1. Willingness to keep up-to-date and to find and participate in seminars, board meetings, and other educational programs relating to real estate.

IV. **Teach Stress Management**

A. **Steps**
   1. Schedule periodic sessions with sales staff and employ the services of professionals when possible to conduct training sessions.

B. **Standards**
   1. Conduct this activity on an occasional basis.

C. **Materials and Supplies**
   1. Trained staff and/or hired personnel to conduct training sessions.

D. **Required Knowledge**
   1. Know how to conduct stress management training sessions.

E. **Attitudes**
   1. Willingness to employ experts (in this field) to conduct training sessions.

V. **Observe and Verify Comprehension of Job Duties**

A. **Steps**
   1. Set up a review procedure and verify the execution of documents and verify (from performance data) that agents are properly conducting their work.
   2. Regularly conduct review sessions during sales meetings, etc. verifying that agents fully understand their job duties as set forth in the office policies and procedures manual.

B. **Standards**
   1. This must be conducted on a regular basis.

C. **Materials and Supplies**
   1. Office operations and procedures manual.
   2. Statistical information (from office records) relating to job performance.

D. **Required Knowledge**
   1. Formal training in management.
   2. EXperience in the operation of a real estate business.

E. **Attitudes**
   1. Friendly and sensitive attitude coupled with the knowledge that employee performance must be observed and reviewed on a regular basis.

VI. **Evaluate and Correct Employee Performance**

A. **Steps**
   1. When evaluations prove that it is a necessary, counsel employees as to the adequacy of their performance.
   2. Ask employee to review their own performance records and invite them to design a proposal for improving the performance.
   3. Review employee proposal and suggest additional things which might be employed to achieve desired results.

B. **Standards**
   1. This activity must be conducted whenever performance indicates need.

C. **Materials and Supplies**
   1. Performance records.
   2. Employee evaluation reports/forms, etc.

D. **Required Knowledge**
   1. Formal training in management procedures.
   2. Experience relating to the operation of a real estate business.

E. Attitudes

1. Management ability coupled with an ability to tactfully work with agents concerning job performance.

VII. Retrain as Needed

A. Steps

1. Keep abreast of changes in mortgage financing, and real estate law and changes in rules and regulations of governmental agencies and the real estate commission.
2. Conduct retraining sessions and present material in step #1 above to agents.

B. Standards

1. Conduct this activity in a timely fashion whenever necessary.

C. Materials and Supplies

1. Notices, alerts, and other bulletins issued by the Real Estate Commission and other governmental agencies.

D. Required Knowledge

1. Formal training in real estate sufficient enough to understand technical bulletins, etc. concerning real estate.

E. Attitudes

1. Alertness and sensitivity to the necessity of watching for changes in rules and regulations relating to real estate.
2. Understand the necessity of keeping agents aware of any changes which may affect the real estate business.

CATEGORY G: PRODUCE INCOME

I. List and Sell Property--For more detailed information on this subject please refer to Category A "List Real Property" in the Real Estate Agents Job/Task Analysis.

A. Steps

1. Collect basic data on the subjects.
2. Collect data on comparables.
3. Analyze the data.
4. Determine the market value.
5. Obtain a listing.
6. Collect specific data on subject.
7. Process the listing.
8. Service the listing.

B. **Standards**
   1. Full and complete information must be accurately recorded.
   2. Records must be maintained on a regular basis.
   3. Solicitation of new business opportunities must be done on a regular basis.
   4. Each task must be done fully and completely.

C. **Materials and Supplies**
   1. Tape measure
   2. Maps of area
   3. Record keeping book
   4. Automobile
   5. Business cards
   6. Office stationary
   7. Telephone and/or answering service
   8. Etc.

D. **Required Knowledge**
   1. Formal training in the successful operation of a real estate business.
   2. Know how to list and sell real property.

E. **Attitudes**
   1. Attention to detail.
   2. Manage time and work accurately.

II. **Appraise Property**--For more detailed information please refer to Category E "Appraise Property" in the Real Estate Agents Job/Task Analysis.

A. **Steps**
   1. Determine the type, purpose, and location of the appraisal.
   2. Negotiate the fee.
   3. Inspect the subject.
   4. Analyze the data.
   5. Reconcile the data.
   6. Prepare appraisal report.
   7. Present appraisal to appropriate people.

B. **Standards**
   1. Complete all tasks accurately and completely for each appraisal.

C. **Materials and Supplies**
   1. Maps
   2. Compass
   3. Standard appraisal forms
   4. Camera
   5. Measuring tapes
   6. Typewriter
   7. Office stationary

D. **Required Knowledge**
   1. Formal training in the successful operation of a real estate business.
   2. Extensive knowledge of the proper standards and procedures required to appraise property.

E. **Attitudes**
   1. Friendly professional attitude.
   2. Willingness to devote time and energy to the appraisal to ensure that it is done accurately and correctly.

III. **Manage Rental Property**--For more detailed information please refer to Category D "Manage Property" in the Real Estate Agent Job/Task Analysis.

IV. **Manage REO'S (Real Estate Owned Property)**--For more detailed information on this topic please refer to III. "Manage Rental Property" above.

V. **Lease Property**--For more detailed information on this topic please refer to Categories A "List Real Property," B "Market Real Property," and D "Manage Property" in the Real Estate Agent Job/Task Analysis.

A. **Steps**
   1. Please refer to I. A. above.
   2. Please refer to III above.
   3. Plan advertising strategy.
   4. Write an ad.
   5. Arrange agent tours.
   6. Notify other offices.
   7. Canvass the neighborhood.
   8. Conduct open house.
   9. Prepare visual aids.
   10. Cultivate professional contacts.

B. **Standards**
   1. These activities must be performed regularly to ensure the successful operation of the real estate business.

C. **Materials and Supplies**
   1. Automobile, telephone, etc.

D. **Required Knowledge**
   1. Formal training in the successful operation of a real estate company.

E. **Attitudes**
   1. Friendly professional attitude.

VI. **Refer Clients**--For more detailed information on this topic please refer to Category F "Discover New Prospects" in the Real Estate Agent Job/Task Analysis.

A. **Steps**
   1. Join service and community organizations.
   2. Cultivate key contacts for referrals.
   3. Contact FSB owners.
   4. Make cold calls.
   5. Work farm area.
   6. Contact expired listings.

B. **Standards**
   1. Conduct these activities regularly.

C. **Materials and Supplies**
   1. Money for dues
   2. Telephone
   3. Telephone book
   4. Records, ledger books, etc.
   5. Automobile
   6. Office stationary

D. **Required Knowledge**
   1. Formal training and know how to successfully operate a real estate business.

E. **Attitudes**
   1. Willingness to contribute time and effort to the operation of the brokerage business.

VII. Consult for Fees

A. **Steps**
   1. If possible, specialize in a particular area such as farm and ranch, industrial, income producing properties, etc.
   2. Study for and obtain professional designation as a real estate consultant.
   3. Advertise services in appropriate media under heading "Real Estate Consultant."

B. **Standards**
   1. Conduct these activities whenever opportunity and experience permits.

C. **Materials and Supplies**
   1. Advertising materials
   2. Professional designation

D. **Required Knowledge**
   1. Many years of experience and more than usual depth of knowledge in specialty area which you hold yourself to be an expert.

E. **Attitudes**
   1. Willingness to seek opportunities in this area coupled with the knowledge that consulting requires a very high level of expertise and experience.

VIII. Broker Loans

A. **Steps**
   1. Obtain a license to operate this business activity when and where ever required.
   2. Conduct continuing advertising program wherein you advertise your services as a loan broker.

B. **Standards**
   1. Conduct this activity as an adjunct business opportunity.

C. **Materials and Supplies**
   1. Telephone
   2. Advertising budget and materials.

D. **Required Knowledge**
   1. Formal training in mortgage finance technique.
   2. Know where to solicit business.

E. **Attitudes**
   1. Friendly professional attitude coupled with a desire to help people obtain mortgage financing for purchase of residential properties, and/or for acquisition of income producing properties.

References: Job Analysis and Training Procedures Study, conducted for the California Department of Real Estate by Educational Testing Services.

Program

Task/Course Identification

Real Estate Broker

Task/Competency	COM Course Title	English 131	Real Estate 131 Principles	Business Math 131	Computer Science 133	Physical Education 111	Introduction to Business 131	Business Communications 231	Speech 131	Real Estate 231 Appraisal	Real Estate 132 Law	Physical Education	Economics 231	Economics 232	Real Estate 232 Finance	Real Estate 234 Management	Accounting 131	Accounting 231	Marketing 231	Cooperative Education 241	Real Estate 233 Brokerage	Real Estate 235 Investment	Real Estate 236 Commercial	Management 231	Business Psychology 231	Cooperative Education 242
Research Economic Conditions			✓			✓			✓			✓	✓	✓	✓			✓	✓	✓	✓	✓	✓		✓
Identify Specific Target Markets			✓												✓	✓	✓	✓	✓	✓	✓	✓			✓
Identify Clientele			✓			✓			✓					✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
Research Financial Markets			✓			✓			✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
Research Data Sources			✓		✓	✓			✓	✓				✓	✓			✓	✓	✓	✓	✓	✓		✓
Evaluate Competition			✓						✓	✓				✓	✓			✓	✓	✓	✓	✓	✓		✓
Establish and Maintain Integrity			✓						✓					✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
Market Specific Services			✓			✓			✓						✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
Promote Name Recognition/Logo			✓				✓	✓	✓						✓			✓	✓	✓	✓	✓	✓		✓
Participate in Community Affairs		✓	✓						✓					✓	✓			✓	✓	✓	✓	✓			✓
Maintain Attractive Premises			✓						✓						✓				✓	✓	✓	✓	✓		✓
Analyze Financial Condition			✓						✓						✓	✓	✓		✓	✓	✓	✓	✓		✓
Establish Goals			✓												✓	✓	✓		✓	✓	✓	✓	✓		✓
Define Sources of Income/Expenses			✓			✓			✓					✓	✓	✓	✓		✓	✓	✓	✓	✓		✓
Prepare Budget															✓	✓	✓		✓	✓	✓	✓	✓		✓
Monitor Financial Status														✓	✓	✓	✓		✓	✓	✓	✓	✓		✓
Utilize Professional Services: Insurance, Legal, Accounting			✓						✓	✓				✓	✓	✓	✓		✓	✓	✓	✓	✓		✓
Recruit Personnel															✓					✓			✓		
Develop In - House Training							✓								✓	✓	✓	✓		✓			✓		
Establish Farm Areas			✓				✓	✓							✓			✓	✓	✓	✓	✓	✓		✓
Plan Productive Sales Meetings		✓						✓							✓			✓		✓			✓		
Implement Productive Sales Meetings		✓						✓							✓			✓		✓			✓		
Review/Evaluate Agents' Activities															✓					✓			✓		
Observe/Counsel Personal Problems															✓								✓	✓	
Monitor All Legal Documents			✓							✓					✓					✓	✓	✓	✓	✓	
Encourage Personnel Input (Internal and External)			✓			✓		✓	✓		✓				✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
Establish Office Policy/Procedure															✓				✓	✓	✓	✓	✓		✓
Delegate Responsibility															✓				✓	✓				✓	✓
Seek New Markets			✓							✓								✓	✓	✓	✓	✓			✓
Create/Monitor Advertising			✓												✓			✓	✓	✓	✓	✓			✓
Review Profit and Loss			✓	✓		✓								✓	✓	✓	✓			✓	✓	✓	✓		
Maintain Physical Plant															✓								✓		
Read Daily News and Trade Publications		✓	✓						✓	✓		✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓		✓
Review Legal Updates			✓							✓				✓	✓	✓	✓		✓	✓	✓	✓	✓		✓
Attend Seminars and Board Meetings			✓						✓	✓				✓	✓	✓	✓		✓	✓	✓	✓	✓		✓
Teach Stress Management					✓						✓								✓	✓					✓
Observe and Verify Comprehension of Job Duties				✓			✓								✓				✓	✓	✓	✓	✓		✓
Evaluate and Correct Employee Performance															✓								✓	✓	
Retrain as Needed		✓	✓				✓		✓	✓				✓	✓			✓	✓	✓	✓	✓	✓		✓
List and Sell Property			✓															✓	✓	✓	✓	✓			✓
Appraise Property			✓						✓										✓						✓
Manage Rental Property			✓												✓				✓		✓				✓
Manage REO'S															✓										
Lease Property															✓				✓		✓	✓			✓
Refer Clients			✓																	✓					
Consult For Fees			✓											✓	✓						✓	✓			
Broker Loans			✓											✓						✓					

Articulation

Developed by Dorothy E. McNutt, Ed.D.
with cooperation from selected
area Texas Community Colleges

THE 2+2+2
ARTICULATION PLAN

College of the Mainland (COM) is committed to establishing articulation agreements among the College and other educational institutions. Articulation enables the college to award credit for certified competencies, regardless of where these competencies are mastered. COM has an obligation to place students at the proper educational level, to enhance student success, to recognize individual differences and accomplishments, and to avoid duplication of efforts between educational institutions.

At COM entering students may receive credits for courses successfully completed at secondary schools and other colleges, obtain credit by examination, enroll in a next-level course through advanced placement, and acquire credit for a prerequisite course after successful completion of an advanced course.

Articulation at COM is viewed as a vehicle for enabling students to matriculate with minimum barriers from one educational institution to another and to receive appropriate recognition.

Articulation is the awarding of credit for certified Texas Education Agency Essential Elements specified for secondary school courses and for credits a student has acquired through previous education and professional certification.

Articulation can begin any time schools agree to recognize and award credits for verifiable competencies.

Articulation requires a general agreement between schools and can be expanded to specific agreements between programs.

To facilitate articulation COM will establish agreements with cooperating schools by:

Completing a written general agreement.

Identifying common courses between each school.

Establishing meetings among faculty for clarification of common competencies.

Signing specific agreements that have identified courses with common competencies.

Updating agreements every two years.

The Dean of Instruction and Student Development may approve a general articulation agreement between COM and another cooperating institution in order to reach an understanding about their interrelationships. This agreement is signed to demonstrate administrative support for an articulation system with effective working relationships. The Dean of Instruction and Student Development may approve a specific articulation agreement after recommendation by a Division Chairperson.

Articulation agreements with secondary schools may include awarding entering students a grade of "CR" for specified courses required in an instructional program. The faculty may recommend specific secondary school courses for articulation credit to the Division Chairperson. Articulation credits will be conditional upon a student's successful completion of advanced courses in a program. A minimum of 15 in-residence credit hours must be awarded before articulated credits can be posted to the student's transcript. A transcript from the following secondary school filed with the Director, Admissions & Records, Registrar, will serve as proof of successful completion of articulated courses. Every two years agreements will be reexamined in light of curriculum changes in each cooperating institution.

An extended, concurrent instructional program of college course work may be offered to secondary students who have completed their sophomore year. To be eligible to enroll and receive credit, a student must have the approval of the high school principal or other school official designated by the ISD. Provisions will be made for such things as eligibility, approval, awarding of credit and other related topics by the Dean of Instruction and Student Development and a designated representative of the ISD.

Articulated agreements with institutions of higher education will be established through the Dean of Instruction and Student Development, the Director, Admissions & Records, Registrar, in cooperation with each Division Chairperson. Articulation agreements help assure that the overall educational experience of transferring students is similar to that of students taking all professional course work at an accredited four-year or upper-division school. An annual, up-to-date publication of course equivalencies for each cooperating institution will be distributed with the COM catalog to all faculty advisors and incoming freshman.

Every five years the COM 2+2+2 Articulation Plan will be evaluated by the Dean, Institutional Development. Such factors as increased enrollment, increased program completion rate, program/course improvement, increased job placement, transferring student satisfaction, and improved relations with other educational institutions will be evaluated.

All possible means should be sought by COM to achieve and maintain full and open communication between secondary and higher

education institutions. Students in the vocational and technical tracks and the baccalaureate tracks at College of the Mainland should be provided with individualized academic and career advisement to assure that their educational goals may be best achieved in the most appropriate period of time.

ARTICULATION AGREEMENT
BETWEEN
COLLEGE OF THE MAINLAND
and
_____INDEPENDENT SCHOOL DISTRICT

I. Participants: College of the Mainland (COM) and _____ Independent School District (ISD).

II. COM agrees to grant credit for prior mastery of knowledge and skills for students completing the course or Program, as specified.

III. Implementation Procedures

A. Student Responsibilities

1. The student must have successfully completed the _____ (course) or _____(Program) with a minimum average grade of B.

2. The student must forward official copies of a transcript and a signed faculty recommendation form.

   These documents must be received by the Director of Admissions & Records, Registrar, at College of the Mainland six weeks prior to the Fall semester.

3. The student must enroll at College of the Mainland within one year of high school graduation.

4. The student must specify a major in a degree or certificate program at College of the Mainland.

5. The student must meet with designated Faculty Advisor.

B. College of the Mainland Responsibilities

1. The Director of Admissions & Records, Registrar, will arrange for the student to meet with advisory personnel.

2. The Faculty Advisor will discuss the Program with the student.

3. The Faculty Advisor will review the student's file and transcript and recommend the student for the

appropriate courses by assessing the student's qualifications for the Program.

4. The Director of Admissions & Records, Registrar, will maintain appropriate files for follow-up.

C. ISD Responsibilities

1. The ISD will communicate the details of the Articulation Agreement to high school Chairpersons, teaching faculty, guidance counselors and students, as appropriate.

1. The ISD will publicize the Agreement to encourage students to take advantage of the opportunity.

IV. Follow-up Procedures

A. An Advisory-Planning Team will be established to ensure the continued validity of the Articulation Agreement. The Advisory-Planning Team will consist of a minimum of the following members:

1. ISD Chairperson or high school faculty in the program area.

2. The College of the Mainland Division Chairperson in the program area.

3. The College of the Mainland, Director of Admissions & Records, Registrar at College of the Mainland.

4. The College of the Mainland, Dean of Instruction and Student Development at College of the Mainland.

B. An Advisory-Planning Team will meet a minimum of once a year to review the following:

1. Program changes or related curriculum changes.

2. Degree of student participation in the articulation process.

3. Progress of students.

C. Participants of this Agreement must notify the Dean of Instruction and Student Development at COM or the Vocational Director at the ISD in the event of any curriculum changes or modifications affecting the intent of this Articulation Agreement.

REFERENCES

Brazosport College Articulation Plan, 1987-88.

Dallas County Community College District Articulation Plan, 1987-88

Harsher, Sharon L. and Day, Phillip R., "High Schools and Community Colleges: Teaming Up for Cooperative Education," The Journal of Cooperative Education. Vol. XXIII, No. 3, pp. 76-86.

Kintzer, Frederick C. and Wattenbarger, James L. The Articulation/Transfer Phenomenon: Patterns and Directions. AACJA, 1981.

Laredo Junior College Articulation Plan, 1987-88.

North Harris County Community College Articulation Plan, 1987-88.

The Ohio State University Secondary Vocational-Technical Education Articulation Survey, 1984.

San Jacinto Community College Articulation Plan, 1987-88.

Tarrant County Junior College Articulation Plan, 1987-88.

TSTI Articulation Plan, 1987-88.

University of Houston Articulation Plan, 1987-88.

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